

**HEADTEACHERS' VIEWS ON THE INCLUSION OF  
STUDENTS WITH SPECIAL EDUCATIONAL NEEDS IN  
TAIWAN**

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2011

## DECLARATION

I hereby declare that the work presented in this thesis was composed and conducted by myself. None of the work included has been submitted for publication nor in support of another degree or professional qualification.

*Chia-Wen Chang* 15/May/2011

## ACKNOWLEDGEMENTS

I gratefully acknowledge the insight, guidance and encouragement of my two supervisors, Professor Sheila Riddell and Dr. Shereen Benjamin. My deep gratitude must go to Sheila Edward for her help with proofreading and revisions of my English. I wish to acknowledge the staff and colleagues of the Moray House School of Education, University of Edinburgh. I am grateful to the headteachers for their participation in this research. Finally, I would like to express my deep gratitude to my supportive and understanding family.

*Chia-Wen Chang*

15/May/2011

## **ABSTRACT**

The main aim of this research is to offer a sociological analysis of Taiwanese headteachers' views of the inclusion of students with special educational needs (SEN) in mainstream schools. Taiwan is a country which combines Confucian and westernised traditions, and these are reflected in its education systems, including SEN provision. To date, there is little research on headteachers' views of inclusion and most studies involve attitudinal surveys. By way of contrast, this qualitative research, which adopts a neo-marxist theoretical perspective, is based on twenty five in-depth interviews with school headteachers, who are regarded as having high social status in Taiwan. In addition, the research presents two case studies of schools implementing inclusive practices, based on interviews with headteachers, analysis of the school websites and media reports. Critical discourse analysis is used to analyse the twenty five interview texts and the case studies. Three major discourses of inclusion are identified: the managerialist discourse, the critical discourse and the school as social microcosm discourse. The extent to which headteachers employ these discourses appears to be influenced by various personal and social factors. Headteachers' understanding of disabled students is the key personal factor influencing their views on inclusion. Further, their unfavourable attitudes towards the inclusion of disabled students may be influenced by the views of parents with non-disabled children, competitive credentialism and the government's stance. With regard to the inclusion of gifted students, the discourses employed are the following: the school as social microcosm discourse, the privileged class discourse and the dilemmatic discourse. The first two discourses are articulated by headteachers holding favourable attitudes towards the inclusion of gifted students whilst the third discourse is articulated by those holding uncertain attitudes. Headteachers' understanding of gifted students is the key personal factor influencing their views on inclusion. Competitive credentialism has a major influence on attitudes towards the inclusion of disabled students as well as gifted students. With regard to the two case studies of schools exemplifying inclusive practices, it is argued that the wider applicability of their approaches is questionable. Overall, the results highlight the Taiwanese government's unclear stance on promoting inclusion. This research has also suggested that a clear operational definition of inclusion is necessary and urgent before the comprehensive implementation of inclusion in wider educational arenas.

## **LIST OF ACRONYMS**

CDA	Critical discourse analysis
CNP	Chinese Nationalist Party
DPP	Democratic Progressive Party
EBD	Emotional and Behavioural Difficulty
HT	Headteacher
IEP	Individual education programme
IPGC	Identification, Placement, and Guidance Committee
ISDGS	Identification Standards for Disabled and Gifted Students
KMT	Kaomingtang Party
LEA	Local educational authority
NBCE	National Baric Competence Exam
NCEE	National College Entrance Exam
PRC	People's Republic of China
ROC	Republic of China
SD	Standard deviation
SEN	Special educational needs
SENCO	Special educational needs coordinator
TMOE	Taiwan Ministry of Education
UK	United Kingdom
UN	United Nations
US	United States
WISE- III	Wechsler Intelligence Scale for Children-III

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# INTRODUCTION

This research has two aims. First, it aims to offer a sociological analysis of Taiwanese headteachers' views on the inclusion of students with special educational needs (SEN), including students with disabilities and students with giftedness and talents. Second, it further attempts to reveal and critique the Taiwanese government's stance on the comprehensive implementation of inclusion, which is enshrined in the Act of Special Education (Taiwanese Ministry of Education (TMOE), 2004). This thesis can be divided into two parts. The first part includes the first four chapters and this part attempts to establish the background and theoretical context for this research. The second part is composed of Chapter Five, Six and Seven. This presents the analytical results, building upon the first part of the research. In Chapter One, the complex political and historical situation of Taiwan is described. Taiwan has been influenced by Western culture and values and there are many well-recognised differences in cultural and social aspects between the West and the Eastern Taiwanese society. Influenced by the Chinese cultural tradition, the long-term Japanese colonisation, the strong political and economic connection with the United States (US) and its own indigenous cultures, the Taiwanese cultural and social context is multi-faceted. Against this background, this chapter begins with a brief description of history of Taiwan, followed by an introduction to the social and cultural context.

Given the fact that the entire Taiwanese society has been influenced by capitalism, the neo-Marxist perspective is explicitly adopted as the main theoretical vine of this research project. According to Patton (1987), this research also can be seen as an 'orientational qualitative inquiry' which 'begins with an explicit theoretical or ideological perspective that determines what variables and concepts are most important and how the findings will be interpreted' (p. 86). Since the neo-Marxist perspective has been adopted as the major theoretical perspective for this research, clarifying the nuances of the Marxist, the neo-Marxist and the neo-Marxian stances in conflict perspectives becomes necessary although some may regard them as synonymous. Drawing a dividing line between the Marxist and the neo-Marxist perspectives is difficult. The former is an economic-determinism stance while the latter may try to include the cultural and social dimensions. Precisely, the neo-Marxist perspective is trying to attach more importance to cultural and ideological aspects of society to modify Marx's overemphasis on the impact of economic determinism on the society (Ritzer, 1992; Burris, 1987). The work of Bowles & Gintis (1977) is the best example. Instead of seeing education

as a mechanism for giving individual development, social mobility and economic power to the disadvantaged, they use the schooling system in the US to maintain that education cannot be understood independently of economy and schools are capitalist agencies of social, economic, cultural and bureaucratic reproduction. As such, some researchers regard them as Marxists (e.g. Moore, 2004; Blackledge & Hurt, 1993) while others regard them as neo-Marxists (e.g. Tomlinson, 1982; Riddell, 2007).

As far as the neo-Marxist conflict perspective in special education is concerned, Tomlinson (1982) gives a detailed description. She regards this perspective as a notion 'that a given educational structure is the outcome of political and ideological struggles between social classes, that class interests are behind any given pattern of educational organisation and that it is not possible to understand the working of any part of the education system independently of the class structure' (p.17). Bowles & Gintis (1977) also argue that the technocratic-meritocratic ideology has a tremendous impact on American schools and society. This ideology actually affects Taiwanese society as much as American society. In fact, this ideology is further reinforced by the Confucian belief in valuing education. In order to move away from an economic determinist stance, the more flexible neo-Marxist perspective is adopted particularly for this research. Based on these notions, this research seeks to understand the relations of power, control and ideology behind special and inclusive practices. These issues belong to the scope of critical educational research (Cohen, Manion & Morrison, 2007, p.28). Partly influenced by the critical theory as applied to special education (this will be further explained in Chapter Three), critique becomes a central part of this research and on the government's policy and practice. Therefore, this is a specifically critical sociological piece of research on special and inclusive education based on the neo-Marxist perspective.

Chapter Two focuses on presenting the Taiwanese education structure, with particular reference to the special education system. The entire education structure is strongly influenced by the American education model and general and special education systems are stratified. Furthermore, the special education system is divided into education for disabled students and education for gifted students. This stratification is expected to help the structure run more smoothly and improve the quality of service. It might be argued that the education structure works efficiently and effectively, to a large extent, with the help of comprehensive deployment of the functionalist model and capitalist management. Students can be efficiently identified and categorised. Provision, resources, placements and policies even, can be

differentiated. However, the dividing lines of different education systems can be transformed into structural barriers between parts. These barriers can hinder the implementation of inclusion because inclusion promotes the emergence and reconstruction of general and special education systems. The first two chapters attempt to set the context for the empirical work on which this research was based. Compared with sociological development in the field of special and inclusive education in the West, sociological perspectives are generally lacking in Taiwan. This is an interesting phenomenon because functionalist perspectives have been developed and emphasised in special education but other sociological perspectives are neglected in Taiwan, despite the fact that Western special education knowledge has been continuously imported. Things in daily life sometimes may not be what they seem. The reason why sociological theoretical perspectives are valuable in research is because they not only offer us different ways to view this world but also guide us to critically challenge and assess the truth of commonly-held assumptions. It is the scarcity of diverse voices that makes applying other Western sociological perspectives urgent and necessary. Taiwan, like Western countries, is one of the democratic capitalist countries. It is this context that applying Western sociological perspectives to examine Taiwan's special education development is appropriate. Not only can it promote understanding of Taiwan's special and inclusive education from different perspectives but it can also help establish a new theoretical platform for this Westernised Confucian country.

Chapter Three reviews a large body of Western and Taiwanese literature in relation to special education and inclusion. A comprehensive review of the literature and theories functions to formulate the theoretical context for this research. Among various sociological theoretical perspectives, choosing an appropriate perspective to understand headteachers' discourse and views on inclusion is crucial. Riddell (2007) uses a meta-theoretical approach<sup>1</sup> to group several sociological perspectives regarding special education into the functionalist and critical paradigms. The former paradigm includes essentialist and managerialist approaches which have been developed for a long time in special education. Within Taiwan's context, these approaches prevail both in research and practice and this is similar to early special education development in the UK. Functionalist paradigms may be important in early special education development as they help establish a consensual system and these paradigms may be highly valued in Taiwan, because it is a Confucian society which stresses collectivism. However, positivist quantitative research focusing on understanding questions such as 'how

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<sup>1</sup> In Skrtic's (1986) article, he discusses the crisis in special education knowledge and paradigm and paradigm shifts. He argues that meta-theoretical paradigms can be thought of as 'a special lens through which the world can be viewed' (p. 8). This lens has the particular property to enhance the clarity with which some things can be viewed.

many? what sort of problem? what to do about it?' are prevailingly popularised (Tomlinson, 1982, p. 14). Contemporary Taiwan is not an entirely Confucian society any more and it is profoundly influenced by Western values and capitalism; as such, understanding special education and inclusion simply based on functionalist paradigms may be insufficient. The critical paradigm (including materialist or critical social policy approaches, social constructionist approaches and civil right approaches) proposed by Riddell (2007) therefore is necessary for this research because it offers more diverse and critical perspectives to understand special education in the contemporary capitalist society.

Within the critical paradigms, conflict perspectives in education have been identified by Tomlinson (1982) as new perspectives on understanding special education. These perspectives are important for this research because they envision society as an arena of inequality that generates conflict and change and they help understand 'the link between education, the reproduction of social relations within capitalism and the way this relationship is regulated by the state' in the field of special and inclusive education (Riddell, 2007, p. 40). Given the fact that all Taiwanese society is influenced by capitalism, as discussed in the previous two chapters, situating this research within the critical paradigm and adopting conflict perspectives is appropriate. Firstly and academically, these perspectives help push the Taiwanese special and inclusive education to another stage. Secondly and practically, conflicts exist in the society and these perspectives help bring a broader social context, such as an economic dimension into consideration.

Chapter Four outlines the methodological consideration of this research. Methodology is not only concerned with tools or the detailed methods of inquiry of a discipline through which data are collected but also with the more general philosophies upon which the collection and analysis of data are based. Specifically, it is the interface of epistemology and ontological underpinnings, theories and methodic practice (Pawson, 1999; Harvey, 1990). Researchers asking themselves what their research is about in a fundamental way is important as well as the methods they use, because this may influence how they analyse and explain knowledge. As such, a set of research questions are presented at the beginning of this chapter. There are two main research questions. First, what are Taiwanese headteachers' views on inclusion of students with SEN in mainstream classes? Second, why do headteachers hold these views and what social factors contributed to their views in this capitalist Confucian society? In this process, taking positions is always necessary and this is particularly significant when undertaking any sociological research (Becker, 1967). The theoretical stance has been

addressed in the previous chapter, while this chapter pays attention to discussing the ontological and epistemological stances of this research.

This research not only attempts to present a particular powerful group's views on inclusion, but also reveals several structural problems and issues from a macro dimension. In order to achieve this aim, twenty five headteachers were carefully selected for this research and the selection criteria of the participants are discussed. Since this research is firmly situated in the qualitative research paradigm and headteachers are regarded as educational elites in Taiwan, qualitative elite interviewing is used as the main method to collect data. In each interview, ten interview questions were asked to gather enough oral text or discourses. Because I used to study and work in the field of special education for years, my identity as a traditional teacher's college graduate<sup>2</sup>, a primary school teacher and a doctoral student in the UK was revealed to every interviewee. Influenced by the neo-Marxist theoretical perspective, critical theory in particular, critical discourse analysis is chosen as the analytical tool to analyse the interview texts. The last section of this chapter deals with the ethical considerations of this research. Owing to the elite identity and high social status of headteachers, protection of their confidentiality and anonymity is the main ethical concern. Because I am a researcher whose identity is triple, how to maintain the power relationship between the researcher and the researched becomes the second ethical concern of this research.

Following theoretical and methodological contexts discussed in the previous two chapters, Chapter Five illustrates the analytical results of the twenty five Taiwanese headteachers' views on the inclusion of students with disabilities in mainstream classes. There are three sections in this chapter. Headteachers' overall views and discourses on the inclusion of disabled students are presented in the first section. This section attempts to answer the first research question of this project. The second section discusses the influential factors of headteachers' views on inclusion. This section aims to answer the second research question of this research and it also illustrates how headteachers' understanding about disabled students affects their understanding of inclusion. The implementation of inclusion always influences the future role of segregated educational settings. Thus, the third section discusses headteachers' views on segregated special education schools and classes.

Chapter Six can be regarded as an extended part of the previous chapter and it attempts to

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<sup>2</sup> In Taiwan, this type of higher and teacher education institute functions to educate and train and produce future primary school teachers in Taiwan. There are nine of them in total and all of their names have been renamed from 'college' to 'university'. The majority of headteachers are also graduates of this type of institutes.

present the twenty five headteachers' views on the inclusion of gifted and talented students, who are the other group of students with SEN. Headteachers' overall views and discourses on the inclusion of gifted students are presented in the first section and this is attempting to answer the first research question of this study. The second section presents the influential factors of these headteachers' views and attempts to answer the second research question. This part also illustrates how headteachers' understandings about gifted and talented students influence their views on inclusion. The implementation of inclusion affects the future of segregated gifted classes. The last section therefore discusses headteachers' views on segregated gifted educational settings.

After analysing headteachers' views on inclusion in the previous two chapters, Chapter Seven turns to demonstrate how inclusion is implemented in Taiwan. Finding a consensus on the operational definition of inclusion is difficult so various practices may be possibly described as inclusive. Given the lack of a clear definition of inclusion and inclusive policy in Taiwan, one mainstream school (School A) and one special school (School B) which officially claim to implement inclusive practice have been specifically chosen as case studies in this chapter. The two schools' websites and their inclusive programme websites, media reports on the two inclusive programmes and the two headteachers' interviews are three major sources for analysis. The inclusive models of School A and School B are discussed in the first two sections. The last section not only compares the two inclusive models but also presents further critique on the two models.

It has been indicated by Tomlinson (1982) that 'sociologists have shown remarkably little interest in special education'. Two decades later, however, sociological analysis on special and inclusive education remains underdeveloped in the Taiwanese education and research context. The primary aim of sociological accounts in this research is to open up new ways of thinking inclusion in Taiwan. In order to grasp a more comprehensive and insightful picture of Taiwanese inclusive education development, understanding views on inclusion of headteachers as school managers is more appropriate than views of other groups of people. The following empirical research has been undertaken with this aim in mind.

# CHAPTER ONE

## HISTORICAL, SOCIAL AND CULTURAL CONTEXT

### INTRODUCTION

The historical, social, cultural and theoretical context of any social science research is always unique and this research is no exception. This research focuses on understanding headteachers' views on inclusion in Taiwan this newly democratic country. The first chapter of this thesis serves to situate the research by offering an overview of Taiwan's historical, social and cultural context. Firstly, I illustrate Taiwan's history to show how this country is influenced by the world and how it moves towards a democratic and capitalist society. Secondly, I address the social and cultural diversity of Taiwan and explain how Confucianism affects the society. Lastly, I compare the similarities and differences between Western ideologies and values and Confucianism and discuss how the two philosophies interact, conflict and shape the contemporary Taiwan into a Westernised Confucian society.

### HISTORICAL CONTEXT

Taiwan, approximately 400 km long and 145 km wide, is an island situated to the East of Mainland China. Geologically, it is divided into Western and Eastern part by the Central Mountain Range (also see Figure 1).



Figure 1.1 The geographical location of Taiwan (Source: <http://www.worldatlas.com/webimage/countrys/asia/tw.htm>)

The island has been colonised by various nations, including the Portuguese, Dutch and Spanish and was ruled by Japanese for about fifty years (1895–1945). In the long colonised



epoch, the notion of capitalism has been continually brought into Taiwan (Gold, 1995). The history of Taiwan is relatively linked with the history of China because Dr. Sun Yat-Sen overthrew the monarchical Ching Dynasty (1644-1912) and founded the Republic of China (ROC) Government in 1911 in China. In 1919, the Chinese Nationalist Party (CNP) was founded and the Communist Party of China (CPC) was also founded in 1921. Owing to the unstable governmental status from the 1920s, the two parties experienced various civil wars and attacks by other countries as both parties and also outside powers attempted to control the orthodoxy of the government. However, the most significant civil war began in 1946 after World War II and ended in 1949. Thereafter the ROC Government and the CNP moved to Taiwan, as a new government was established as the People's Republic of China (PRC) in mainland China. It was this event which led to many controversial and complex political issues between Taiwan and China. China's government led by the CPC regarded Taiwan's government led by CNP, as a government in exile and claimed Taiwan as part of China. After WW II, the world entered the Cold War period and the Korean War occurred in 1950. In the War, President Chiang Kai-Shek agreed to let the US Seventh Fleet use Taiwan as a military base. It was by this historical event that the US Government recognised the military importance of Taiwan in the Asian-Pacific region (Tien, 1992). In 1957, the US Government used Taiwan as its military base again for the Vietnam War. Taking advantage of the conflict between the US and communist countries, the Taiwan Government decided to develop the society into a highly capitalist economy after the split between Taiwan and China whilst the Government was aware of the importance of controlling and consolidating its one-party dominant position. Meanwhile, the entire society had to be rebuilt in the aftermath of war. In order to distinguish Taiwan from China's communist totalitarian government and rebuild the societal order in the most secure and easily controlled way, Martial Law was imposed in 1949. In the Martial Law Period (1949-1987), Taiwanese people had limited freedom on speech, news, criticising the government and organising political parties and the government could oversee all information. Political dissidents and public discussions were repressed but the regime was not entirely totalitarian so this period was also called the White Terror Period.

In the 1960s, the stock exchange market system from the West was started. This increased the speed of capitalisation and changed the entire economic dynamics. People started to pursue profits and money by investing in the stock exchange markets. During the Martial Law period, the United Nations (UN) General Assembly admitted the China's PRC Government to membership and expelled Taiwan's ROC Government from its UN seat in 1971. After this, there was a deadlock between Taiwan and China and the question of

whether Taiwan was a recognised country arose from this period. Expulsion from the UN and the first Energy Crisis in 1973 inspired the government to implement a catching-up modernisation policy to start its national infrastructure projects in the 1970s. Owing to this policy, Taiwan's economy rapidly improved and it became one of the Asia's Four Little Tigers. In 1979, the United States (US) government terminated its relationship with the Taiwan government and turned instead to China to attempt to build a relationship. Since then, Taiwan has not enjoyed official diplomatic relations with the US. However, in order to maintain its old economic and trading links with Taiwan, but not damage its new relationship with China, the Taiwan Relations Act<sup>3</sup> was legislated by the US government to sustain the balanced triangle relationship. Because of this relationship, many Western values such as emphasising freedom, individualism, equality and rights were adopted to some extent along with the economic relationship. The central government, however, continued to exercise its control on citizens' freedom.

Table 1.1 Historical events in Taiwan

Year	World	Taiwan	Historical events
1895-1945		Japanese colonised	Japanese colonised Taiwan for 50 years.
1910s-20s	WW I	Civil war period	1911: The Republic of China (ROC) government was founded in China
			1919: Chinese Nationalist Party (CNP) was founded in China
			1921: Communist Party of China (CPC) was founded in China
1940s	WW II & Cold War	Martial Law period (1949-1987)	1946-1949: Chinese Civil War
			1949: ROC government moved to Taiwan and PRC government built in China. This is the official and physical split of Taiwan and China.
1950s	Korean & Vietnam War		1949: Martial Law was enacted in Taiwan. (Dominant-party system)
			1950: Taiwan was used as a military base for the US Government in the Korean War.
			1957: Taiwan was used as a military base for the US Government in the Vietnam War
1970s	Cultural Revolution in China (1966-1976) The 1 <sup>st</sup> Energy Crisis		1970s: National major infrastructure projects
			1971: UN General Assembly admitted the PRC and expelled the ROC
			1979: US terminated the relationship with Taiwan and built the relationship with China on the one hand. On the other, the Taiwan Relations Act was enacted by the US government to protect Taiwan's safety.
1980s	Tiananmen Square Protests in China (1989)		1987: Martial Law was rescinded.
			Two-party system started in Taiwan: KMT (CNP= KMT) vs. DPP
			KMT is the dominant Party and it is known as the Blue Party.
			DPP is the opposition Party and it is known as the Green Party.
1990s onwards	Collapse of Soviet Union  German Reunification	Democratic period	1995: China tested its missiles on Taiwan Strait. (The collapses of communist country, the Tiananmen Square Massacre and missile-testing events caused by China accelerated the democracy progress in Taiwan.)
			1996: The Blue Party won the 1 <sup>st</sup> president election
			2000: The Green Party won the 2 <sup>nd</sup> president election.
			2008: The Blue Party won the 4 <sup>th</sup> president election.

<sup>3</sup> This Act is 'to help maintain peace, security, and stability in the Western Pacific and to promote the foreign policy of the United States by authorizing the continuation of commercial, cultural, and other relations between the people of the United States and the people on Taiwan, and for other purposes' ([American Institute in Taiwan, 2010](#)). This Act is enacted based on complicated political, economic and military considerations. It is also stated in the Act that the US government can sell defensive weapons to Taiwan.

It was not until 1987 that Martial Law was revoked and the Taiwanese people began to enjoy Western values. It was the end of the White Terror Period and sparked a period of expanding economic growth, the Taiwanese people started to pay attention to their rights of freedom and wellbeing. Soon, another political Party, the Democratic Progressive Party (DPP) was organised as the opposition to the government and Taiwan's political development officially entered into the two-party sanctioned system<sup>4</sup>. The CNP is also called the Kaomintang Party (KMT) or the Blue Party and the DPP is also called the Green Party. Comparatively, the Green Party is a more aggressive opposition party. The core of the Green Party's political discourse is to claim complete independence and autonomy for Taiwan so the Green Party continuously challenges the Blue Party's stance of building rapport with China and its nationalist identity. The Green Party regards China as the greatest political threat and competitor so the Taiwanese have to be considerably competitive in all aspects in order to oppose China's political power and repression. In 1995, China carried out a missile testing in the Taiwan Strait and this crisis caused great concern in the US. Along with the 1989 Tiananmen Square protests, the two key events were socio-political midwives pushing Taiwan into holding its first presidential election in 1996 and thus accelerated its democracy. The Blue Party won the election. Taiwan was hence transformed into a democratic country. The Green Party leader won the second president election in 2000 but lost out in the fourth election in 2008. Compared with other developed democratic countries, Taiwan's democracy is fairly new. Despite Taiwan being a democratic country now, its diplomatic isolation remains a long-term challenge. These historical events are tabulated in Table 1.1.

## **SOCIAL AND CULTURAL CONTEXT**

### **Diverse Culture**

In addition to its complex history and political diversity, Taiwan's social and cultural context is also diverse. According to the Central Intelligence Agency (2010) of the US Government, the population in Taiwan is about 22.7 million and Taiwanese make up the majority of the population (around 84%). 14% are immigrants of Han extraction from China whilst those of Austronesian ancestry, who are the earlier inhabitants of Taiwan, form the minority (around 2%). These minor ethnic groups are officially named as indigenous people by the government. This social status is similar to the aborigines in Australia, New Zealand, America and Canada. These indigenous people, at present, are comprised of 13 different

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<sup>4</sup> Now there are some other small political parties in Taiwan.

tribes<sup>5</sup> and most of them live in Eastern Taiwan or in the less-developed mountain area. Although these thirteen tribes have their own languages and cultural norms, Christianity is generally their religious belief. This can be attributed to the effect of being colonised by various European countries.

## Confucianism and Capitalism

In addition to the indigenous culture, Taiwan's culture is closely linked with Chinese culture so Confucian philosophy plays an important role in Taiwanese society. Traditional Confucianism is not a religious belief<sup>6</sup> and Confucius, the founder, lived in China between 551 to 478 BCE. Owing to his progressive philosophical discourses, he is regarded as the most prestigious and respectful teacher in Chinese history. *The Analects*, a combination of selections of his political, moral, ethical and educational discourses, is the first and the only Confucian classic containing the richest context regarding education. After Confucius's death, his followers and students expanded his philosophy and produced more classics regarding Confucianism. These classics are taught in most Chinese societies so the Confucian ideology is widely disseminated. It not only shapes the knowledge, values, beliefs, ethics and ideology of the Taiwanese people but it also affects how people behave<sup>7</sup>. With the help of education, the dominant position of Confucianism is unshaken and it affects the cultures of other Asian countries such as Japan, South Korea, Malaysia, Vietnam and Singapore. To explain fully the connotation of Confucianism is difficult and this is not the place to do so in this thesis. However, it is important to understand the basic features of this philosophy. According to Redding (1993, p. 48),

The Confucian philosophy is an attempt to find a form of order for people which will be in accord with the order of the natural world. By the cultivation of interior of goodness and by coupling it to exterior grace through the encouragement of social decorum, society at large will come to exhibit the kind of balance, reasonableness and considerateness typical of the best human beings.

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<sup>5</sup> Further information regarding these 13 tribes can be found on <http://www.apc.gov.tw/english/>.

<sup>6</sup> Although it is stated clearly in the Analects that Confucius did not talk about the subject of spiritual beings (Confucius's 2005, p. 201), people continue to worship Confucius and regard him as a religious figure. This may be traced back to the influence of intellectual consolidation which fused the social Confucianism, nature-related Taoism and spiritual Buddhism in the thirteen century (Sung Dynasty). This synthesis is known as neo-Confucianism (Redding, 1993).

<sup>7</sup> Two phenomena show the strong effect of Confucianism on Taiwanese life. First, for the government bureaucracy, Confucius temples (see <http://www.ct.taipei.gov.tw/>) are built by the central or local governments for civil servants and citizens to worship. A national Confucius Ceremony is held annually in a Confucius Temple and the central government officers (including the President) will attend. For the citizens, Confucius temples are built privately for examinees or students to worship or pray. By doing so, it is believed that examinees can perform outstandingly in every exam.

Further characteristics of Confucianism include reverence for traditional moral values and authority (Bush & Haiyan, 2002). These authorities may include professionals or seniors in every aspect of daily life. Confucianism stresses collectivism (Wang & Mao, 1996) so enhancing welfare for a group is more important than an individual's welfare. Gaining consensus is more important than expressing personal opinion. To some extent, this is very similar to functionalism in the West's history. Neutralising, harmony and balance are also encouraged (Chen & Lu, 1994). Being neutral means 'when confronted with two extremes, one always adopts the middle course in his dealings with people or problem'<sup>8</sup> (p. 244). For example, adopting a socially neutral stance involves deferring to collective power. Put simply, no comment/opinion may be the best comment/opinion. Confucianism places a high value on education and philosophy. Also, Confucian classics are taught at early age in the Taiwanese education system and the texts are often used in textbooks and examinations. As mentioned, Taiwan was colonised by Japan and Confucianism had an influence upon Japan. Owing to the common authoritarian nature of Confucianism and colonialism, Confucianism was reinforced in the period of Japanese colonisation. Comparatively, Confucianism was devalued during the Cultural Revolution<sup>9</sup> period from 1966 to 1976 in China. At that time, Confucianism was regarded as an out-dated ideology and an obstacle to development. In order to make a clear distinction between Taiwan and China, the Taiwanese government not only continuously advocates Confucianism but also imports Western values and capitalism as means to contend with communism.

As mentioned, capitalism plays a dominant role now in Taiwan so explaining it is necessary before moving on to comparing the difference between capitalism and Confucianism. In terms of the Marxist perspective, capitalism involves the investment of capital in the production of commodities with the purpose of maximising profit to accumulate more capital. However, the capital is owned by a minority (the upper ruling class or the bourgeoisie) gained by exploiting the majority (the oppressed working class or the proletariat). The ruling class exploits the lower class and this causes continuous class struggle and conflict between the two classes. This chain structures society and drives society to change. Using the US as an example, it has been indicated that protecting the minority in decision-making and subjecting the majority to the minority are characteristics of the US capitalism (Bowles & Gintis, 1977). Capitalism influences also almost every aspect of life. Since Taiwan is profoundly influenced by the US, these features can be found in the Taiwanese society as

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<sup>8</sup> In Chinese, this concept is called zhong-yong and it is fully discussed in the Confucian classic *The Doctrine of the Mean*.

<sup>9</sup> In the Cultural Revolution period in China, China government advocated conflicts and destroyed many antiques and historical sites and devalued out-dated culture.

well. Comparatively, however, some researchers argue that capitalism is a more rationalised result than Marx's uni-dimensional idealism based on conflict caused by human nature of surviving. Weber thinks that efficiency, speed, precision and calculation are features of capitalism (Gerth & Mills, 1948). The stances on understanding capitalism may be different but it is obvious that class conflict, exploitation, producing capitals and profits and stressing efficiency, speed, precision and calculation are features of the capitalist Taiwanese society.

### **A Westernised Confucian Society**

The combination of Western and Eastern ideologies and values basically interact and intertwine well in Taiwanese society. This combination transforms the societal dynamics from a traditional, collectivistic and consensual Confucian societal climate into a more democratic, individualised and materialistic societal climate. As discussed earlier, Western values such as freedom, individualism, equality and rights have been continuously imported into Taiwan. However, the importation was limited as the Taiwanese Government was still a highly centralised polity before 1987. However, it is evident that the Taiwanese society is becoming more and more Westernised nowadays. Capitalism transforms Taiwan from an industrialised economy into an investment- and trading-based economy. Taiwanese people started to pay great attention to their individual rights and democracy and freely take stances to criticise politics and politicians. This is interrelated with the influence of the capitalist economy, because people start to enjoy the profits and improvement of life brought by capitalism. However, this does not mean that the importation of Western values and capitalism causes no conflict with Confucian tradition. Below, I explain some similarities and difference between Confucianism and capitalism in more detail.

Oppression, exploitation and conflict between the ruling and the subject classes are regarded as central features of capitalism by traditional Marxists. Neo-Marxists suggest that bureaucratic organisation and hierarchical lines of authority driven by this conflict are characteristics of capitalism (Bowes & Gintis, 1977, p. 104). Precisely, this authoritarian bureaucratic nature is passively driven by the continuous conflict between classes on the one hand. However, the ruling class also actively controls and reproduces this authoritarian line on the other. The essence of emphasising authority is similar to Confucianism but the difference is that Confucian authoritarianism line is more actively created by the ruling class rather than passively through the suppressing conflicts. In Confucianism, it continues encouraging people to be filial to their parents and resigned to and respectful for their seniors

and the authorities. On the footing of democracy, both capitalism and Confucianism contain the nature of oppression as the lower class is dominated by the upper class.

The survival instinct and the need to produce goods is another characteristic of capitalism. This results in human competitive nature. In order to survive in the capitalist world, being competitive and making use of strategies to make profits are crucial and this is also different from Confucianism. Confucianism focuses on personal moral development, maintaining a balanced, equilibrium and neutral state rather than encouraging conflict and competition. For Confucius (2005), he claims that 'Riches and honours acquired by unrighteousness are to me a floating cloud.' (p. 200). In the capitalist marketplace, business strategies are widely used to make profits to the largest extent. This may not fit with Confucian's claim. Instead of chasing private wealth, property and profits and letting class struggle and class conflict continue, he encourages people to pay more attention to public affairs and help increase public wealth. Linking with the harmonious nature of Confucianism, competition and conflict are not encouraged because conflicts may affect the harmonious and balanced social order of society. This notion does imply that an individual has to be submissive to the societal structure to some extent. However, this does not devalue the belief of being hard-working and diligent, a common feature of capitalism and Confucianism. In addition to his concerns about people and governing, Confucius does talk about economic issues in the Analects. He (Confucius, 1979) claims that in government, 'If a man benefits the common people by taking advantage of things around them that they find beneficial, is this not being generous without its costing him anything?' (p. 159). In this statement, 'a man' refers to a government servant. To a great extent, he is trying to suggest that the government should return economic power to the common people and let them pursue their benefits. This is a neo-liberal economic position. However, the severity of exploitation and conflict in capitalist society was not foreseen by Confucius because there was no capitalism in his epoch. In this capitalist world, the free market economy is a two-edged system. On the one hand, people do enjoy the freedom to maximise their profits; on the other, class conflict and exploitation continues.

Features of capitalism such as stressing efficiency and calculability are not mentioned in Confucianism. Confucius (2005) suggests that in governing, 'Do not have things done quickly; do not look at small advantages'. His political claim not only affects the bureaucracy but also impacts on daily life because it is used as an analogy to refer to many things. With the influence of capitalism, however, contemporary Confucian societies value

efficiency and calculability as much as Western countries do nowadays. For Confucianism, education is a means to achieve self-cultivation and to be a man of virtue is highly valued. This perspective on education is developed from an epoch without capitalism. By contrast, the capitalist view is that education is driven by the economy so capitalists believe it should be valued because it can lead to improvement in productivity and the labour market. Table 1.2 shows these similarities and differences.

Table 1.2 A comparison of capitalism and Confucianism		
	Capitalism	Confucianism
Similarities	An authoritarian and an oppressed lower class (The upper class controls resources and exploits the lower class.)	An authoritarian and an oppressed lower class (New staff, the youth and students are taught to be obedient, respect and submissive to the seniors, the elderly and teachers.)
Differences	Conflict and competition; Individualism; Making and maximising profits;  Stressing efficiency, calculability, predictability and precision Education is driven by economy.	Harmony, equilibrium, balance and neutrality; Collectivism; Paying more attention to the public affairs rather than pursuing wealth; In governing, do not have things done too quickly.  Education is not driven by economy; it is a self-cultivation.

Although Taiwan is constantly striving to find an eclectic and neutral way to strike the balance between Western and Eastern ideologies and values, Western values and capitalism undoubtedly and continuously affect the Taiwanese society. Capitalism permeates into every aspect of life so people are more materialistic and fanatical about making money. For instance, the Western stock exchange market system was introduced in the 1960s, as mentioned, and continues to have a powerful influence. Stock exchange market information is almost everywhere. It can be obtained from TV channels, banks and websites and any bank customer can freely buy and sell stocks in person or by telephone and websites. Investment products are fully available in the marketplace so, in addition to their occupations, people can calculate and predict their profits through investments more efficiently. This completely changes the dynamics of the traditional labour market. However, people with capital tend to rely more on investing but those without capital tend to maintain their working class position and identity. In terms of Marxist's perspective, the class conflict persists in a slightly different form.

Compared with the rising and dominant power of capitalism, the Confucian tradition of being submissive, respecting authority and gaining consensus are slightly devalued because individuality is emphasised and every individual starts to become aware of class conflict. This leads people to exercise their free will to challenge and argue with the powerful dominant authority and the structure. Taking the Taiwanese school system as an example, its American model is in an awkward and conflicted situation in Confucian society. On the one



hand, teachers must teach students Confucian traditions (such as respect for authority, stressing collectivism and respecting teachers). On the other, teachers emphasise individuality and democracy and teach students Western values, scientific thought and the importance of challenging authority (more details regarding the influence of capitalism on education, particularly special education, is discussed in Chapter Two). When a person enters the labour market in a Confucian society, they also have to strike the balance between the Eastern and Western ideological systems. Of course, the more capitalistic the working environment is, the less the role of Confucian philosophy. Understanding the benefit and drawback of Confucianism and capitalism, the ruling class can exercise them more subtly and flexibly in order to secure their dominant positions. For instance, the upper bourgeoisie class can persuade the lower proletariat class to be submissive and harmonious and not to conflict with the ruling-oppressive class structure by claiming that this is Confucian tradition. Overall, it is obvious that Taiwan is a highly capitalist society, and that Confucianism, whilst still important, has a declining influence.

## **SUMMARY**

The history of Taiwan is linked with various European countries, Japan and China. Similar to many Asian countries, Taiwan is both affected by Eastern Confucianism and Western capitalism. Among these Confucian Asian societies, Taiwan is a newly democratic country and this is rare in Asia. There are five features of Confucianism, including worshipping traditions and moral values; respecting authority; stressing collectivism; being neutral and harmonious; and highly valuing education. Comparatively, class conflict, exploitation, producing capitals and profits, stressing efficiency, calculability and predictability are a snapshot of the capitalist society. By comparing Confucianism with capitalism, there are some similarities and differences to be found. Interactively influenced by Eastern and Western values and ideologies, Taiwan has been transformed into a highly capitalistic Confucian society. The two ideologies continue to affect every aspect of Taiwanese life, but the influence of capitalism is more powerful than Confucianism nowadays.

## **CHAPTER TWO**

# **THE STRUCTURE OF THE TAIWANESE EDUCATION SYSTEM**

### **INTRODUCTION**

Taiwan's education system has a complex background because of the influence of its complicated historical and cultural circumstances as discussed in the previous chapter. Its basic education model was built in the early Japanese colonial period, but the influence of Western power led to the introduction of the American education model. The entire education system for students is divided into a mainstream education system and also a special education system. Both systems are hugely influenced by Confucianism and the American education model (Lee, 2004; Chou & Ho, 2007). The special education system is entirely a Western concept imported into Taiwan and it runs via a unique mechanism. The two systems are operated by the education administrative hierarchy mechanism. This administrative system also tries to find an eclectic way to operate the mainstream and special education systems under the dual influence of capitalism and Confucianism. In this chapter, I analyse Taiwan's mainstream and special education systems as well as the education administration hierarchy followed by a discussion of how Western values and Confucianism influence the entire structure.

### **GENERAL EDUCATION SYSTEM**

In this section, I firstly describe the education administration system and then analyse how the educational hierarchy creates the entire general education system. Taiwan's educational administrative system consists of three levels: the Ministry of Education at the central government level, two Municipal Bureaus of Education<sup>10</sup> at the municipal level and various Bureaus of Education at the city and county (local government) levels (Taiwan Ministry of Education (TMOE), 2006a; also see Figure 2.1). The tasks of the Ministry of Education are formulating national education policies as well as overseeing operations of national primary and secondary schools/universities/colleges and some private universities/colleges. It also supervises the local Bureaus of Education. The role of Bureau of Education is similar to local

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<sup>10</sup> The two Municipal Bureaus of Education are located in the two largest cities in Taiwan (one is in the capital). The Ministry of Education is also in the capital.

educational authorities (LEAs) in the UK. The two Municipal Bureaus of Education and local Bureaus of Education are responsible for supervising and overseeing public and private schools and social education organizations at city and county levels. There are special education divisions in the Ministry of Education, the two Municipal Bureaus of Education and all the other Bureaus of Education. As far as school administration hierarchy is concerned, it is generally structured at three levels: one headteacher, deans (e.g. dean of academic division, dean of financial division and dean of counselling division) and various coordinators (coordinator is often a concurrent position held by teachers). Public school headteachers, deans, coordinators and full-time teachers are civil servants in the Taiwanese bureaucratic hierarchy system.

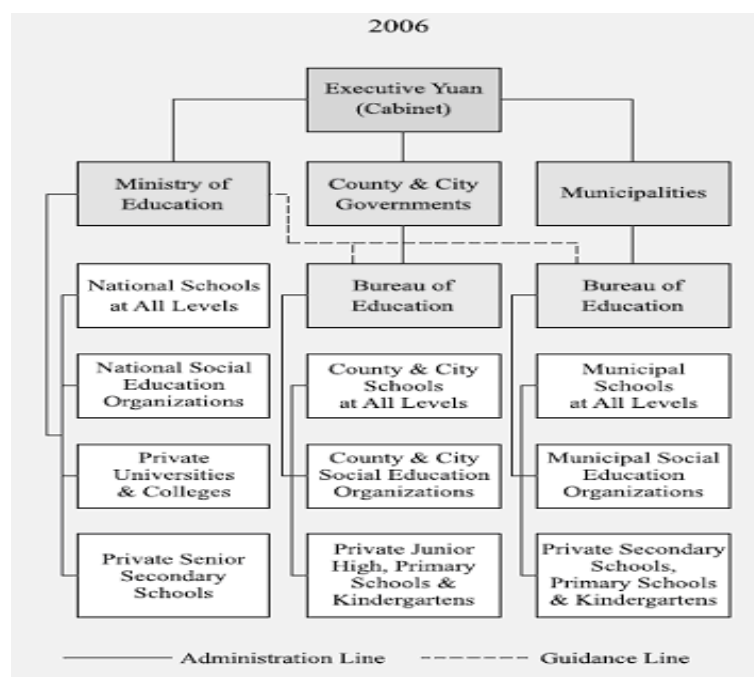


Figure 2.1 The education administration system in Taiwan (Source: TMOE, 2006a)

This hierarchical system is an elitist structure. Influenced by the Chinese ancient imperial examination system<sup>11</sup>, the Confucian tradition of valuing education and Japanese colonialism, every member in this structure must pass exams to obtain a position. A person must pass rigorous paper-and-pen and oral exams to take a teaching position. After years of teaching, he/she can obtain the position of dean by competing with other teachers in the dean exam. The route to becoming a headteacher in a public school is the most arduous and rigorous. A headteacher examinee must be a dean with years of working experience. He also needs to be

<sup>11</sup> This system was established in Sui Dynasty (581-618 CE) and abolished in Ching Dynasty (1644-1911 CE) in China so there was no exam system in Confucius's epoch (also see Zeng, 1999). This literati exam system has a tremendous impact on the modern Taiwanese civil servant system. Up to now, anyone who plans to be a civil servant in Taiwan must take exams.

examined by educational scholars, governors of City/County Bureau of Education, representatives of parent associations, teacher representatives and other headteachers (Wen 2007). Being a civil servant in the central or local government education sector, he/she has to take the national civil servant exam. Through this competitive selection mechanism, all educational bureaucratic positions are highly secure and well-paid. These educational elites are academically competitive and they have high social status<sup>12</sup> in Taiwanese society. Taiwanese people use the term 'iron rice bowl' to describe their positions, which is guaranteed so it is like an iron bowl; the rice means that the government will continue filling the bowl with a guaranteed salary. One task of these educational bureaucrats is to run the Taiwanese education system.

In the Japanese colonial period, however, they were governed by the Japanese so they did not have full autonomy to make decisions. In that period, Japanese-style schools were built nationwide. The education system and the school therefore functioned as a means of governing people and installing Japanese culture. At that time, many people were unable to afford education because education was not compulsory and free at that time. Since then, Taiwan's education system has been divided into three phrases: six years of primary education, three years of junior high education and three years of senior high education (see Figure 2.2). After the colonial period, Taiwan entered the Martial Law Period and the central government began to exercise its full governance and control. In order to eliminate Japanese colonialism and reinforce centralisation, it used some measures<sup>13</sup> to control citizens' ideology and thoughts via education. In 1968, the Nine-Year Compulsory Education Regulation was promulgated so every student could receive compulsory schooling from aged six to fifteen. In 1979, the Citizen Education Act was enacted and this act made legal the nine-year compulsory education system. Upon finishing compulsory education, students can now choose to continue receiving non-compulsory education or to enter the workplace. For those who decide to continue studying, they must take the National Basic Competence Exam (NBCE) and decide whether they want to enter an academically-oriented senior high school or a vocationally-oriented senior vocational school. Normally, students spend eight hours a day in school. Taiwan is a capitalist country and education enterprise is often regarded as a

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<sup>12</sup> According to Fwu & Wang's (2002) study, the top ten high social-status positions in Taiwanese society are: (1) university professor, (2) government minister, (3) judge, (4) physician, (5) lawyer, (6) secondary school headteacher, (7) engineer, (8) primary school headteacher, (9) secondary school teacher and (10) architect. Although this study is done in 2002, it still shows the high status of headteacher within the Taiwanese social context.

<sup>13</sup> One of the measures is to require schools to hold national flag raising ceremony every morning before teaching sessions. In this ceremony, the headteacher usually stands on the stage and students and teachers must gather in the court. Everyone has to sing a national anthem and stare at the flag. This gathering ritual still can be seen now in schools but its function is to let the school head or administrators do some announcement.

huge market so a variety of crammer schools are available in the marketplace. A large proportion of students go cramming for extra education after school. If students want to take their undergraduate degree, they must take the National College Entrance Exam (NCEE). The result of the NBCE or NCEE will be posted to the examinees and entrance standard of each school will be announced. For those who plan to do their postgraduate degrees, they must take the postgraduate entrance exams. Because of the combining effects of the end of the Martial Law Period, the first presidential election and the high pressure of academic competition, the first education reform did not begin until 1997. Decentralisation, deregulation and reducing academic pressure and competition are three main features of the late 1990s.

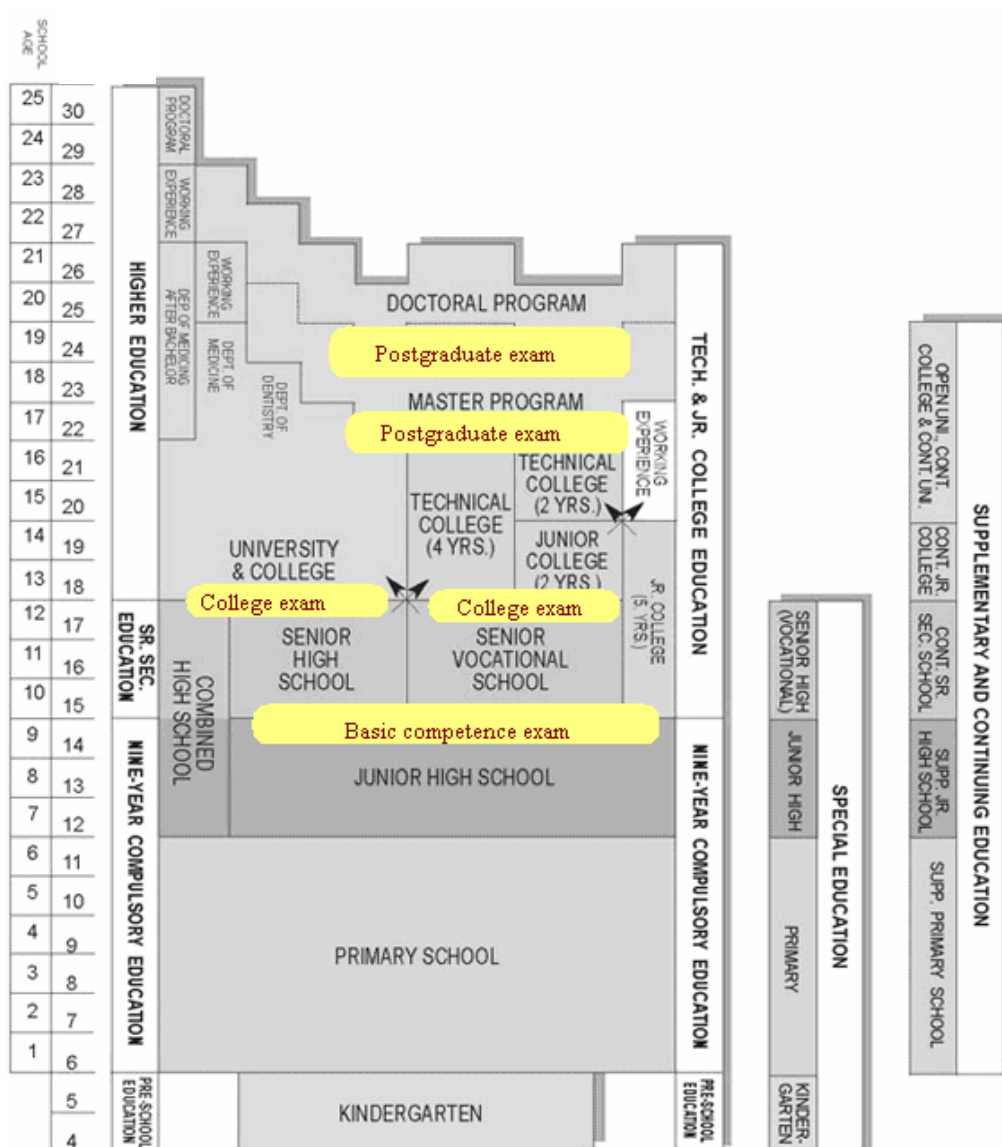


Figure 2.2 The education system in Taiwan (Source: TMOE, 2006a)

Note: Thousands of cram schools are available for students at every educational level in the marketplace.

# THE DELIVERY OF SPECIAL EDUCATION

## Legislation

Special education, part of the general education system, was also established by the educational bureaucrats; uniquely however, this system has its own special mechanism. It has been suggested that the context of policy document production, policy-making process and implementation should be taken into consideration when examining education policy (Bowe, Ball & Gold, 1992). Following this suggestion, I not only describe the special education system but also examine the relevant policy-making process. As argued by Lee (2004), the American model of special education has been imported because it helped reduce the planning period in establishing a Taiwanese special education system. Obviously, factors such as efficiency and efficacy are taken into consideration in this importation. There was no special education legislation before the 1980s as the Taiwanese people were repressed, so education for students with special needs was not emphasised. Before the legislation of the Act of Special Education in 1984 (see the full content in Appendix 1-1), there were only segregated and isolated special schools, institutions or special classes available for students with moderate or profound disabilities. Students with learning difficulties and gifted students were all included in mainstream classes at that time. On the face of it, this appeared to be inclusive education. However, the teacher-student ratio in mainstream classes was very high (about 1:50 or 1:60) so students with special needs were included in mainstream classes but were not receiving either individualised or appropriate education. It was not until the Act was passed in 1984 that the educational rights of students with different needs were stressed. Including gifted students in the Act of Special Education aroused controversy in the legislative process because this influences resource allocation and policy implementation. In meetings about the legislation, some legislators questioned the appropriateness of including gifted education in the Act because including two extremely different issues in one law conflicted with the rules of law-making and it could have caused confusion in practice (Taiwan Legislative Yuan, 1984, p. 23, 33, 45, 53 & 54). The Minister of Education (Taiwan Legislative Yuan, 1984, p. 47), however, explained that the decision to include gifted students in the Act was made by professionals who drafted the Act on the grounds that:

...giftedness and disability are unusual and are two extremely unusual dimensions. Being unusual is being special. Also, it is a global trend and other countries recognise this idea as well so they maintain the incorporation rule to integrate these two in. I am a layman of special education and a layman doesn't do insiders' tasks. The Act of Special Education draft is all produced by professionals.

This bureaucratic statement does not help clarify the controversy *per se*; instead, it reveals the complex and entirely political decision of including gifted students in the Act. This Act was first announced in 1984 so it was a product of the centralisation period (Martial Law Period). In that post-colonial centralised period, establishing new efficient control mechanisms was crucial so simplification was necessary. In this regard, categorisation of pupils was deemed necessary because it helped simplify the complicated bureaucratic process. This kind of categorisation may provide a rationale for allocating scarce resources (Lipsky, 1976 & 1980). Undoubtedly, the reason for including gifted students in the Act was not as simple as that. Bureaucrats exercise discretion in every decision they make (Lipsky, 1976 & 1980). This significant decision on the legislation of the Act was made by discrete interaction and compromise between bureaucrats, legislators and special education professionals. After the Act was enacted, an interpretation and implementation phase followed. As discussed earlier, the education reform movement began in the late 1990s (Taiwan Executive Yuan Educational Reform Committee, 1996). The government's national mainstream education discussions started in 1997 and the special education agenda was included. However, the official discussion on special education was separate from the mainstream education discussion because the Minister of Education thought that special education was too complicated to be mixed up with the mainstream education issues (Hung, 2001). As a result, two national special education conferences<sup>14</sup> (one for the education of gifted students and one for the education of disabled students), followed by the national education reform conference, were all held separately. The dichotomy (mainstream versus special education; gifted education versus disabled education) shows the bureaucrats' preference for simplifying complex issues.

## Policies

After the two national special education conferences, one policy report was made for disabled citizens. As Kogan (1975) contends, 'policies are the operational statements of values' (p. 55). Since the government dichotomised the education system twice, this implies that the government may allocate different values to these segmented systems. Furthermore, these legislators, policy-makers and professionals may 'set and enforce high standards in the application of their professional knowledge to the solution of problems on behalf of the

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<sup>14</sup> Scholars who produce the draft of the 1984 Act of Special Education are all key members of the national special educational conferences. They are also distinguished scholars who shaping the whole special education system in Taiwan. One of the scholars has become the Minister of Education when the two significant special education conferences are held in 1995 and 1996.

public good’ (Skrtic, 1991, p.88). These powerful groups therefore were consulted on involvement in the assumedly objective legislation and policy-making process. This specialisation may help increase efficiency for bureaucracy, as Lipsky (1980) has suggested, but they seem to underestimate how unbreakable and invulnerable a structure can be once it is segmented and constructed. This structure may develop and configure in its own mechanism when more vested interest groups are involved. In other words, this assumedly objective structure may result in a metamorphosis or deterioration without constant examination. How this separated system can be moulded into the mainstream education system is a serious problem. Following the reforms, amendment of the Act of Special Education was completed by 1997. But the amendments are few and the entire special education system remains dichotomised. Since then, it has served as a landmark and guidepost for special education in Taiwan.

## Identification

Since special education is divided into special education for disabled students and gifted education, a robust identification system for them must be developed in order to do further categorisation. Basically, the term ‘special educational needs (SEN)’ does not appear in national or local government legislation in Taiwan. The Taiwanese government uses the term ‘the gifted/disabled citizens’ in the Act of Special Education to refer to people who are in need of special educational provisions (TMOE, 2004). The identification system can be divided into two routes: one is operated as the medical route and the other is the educational route (see Figure 2.3).

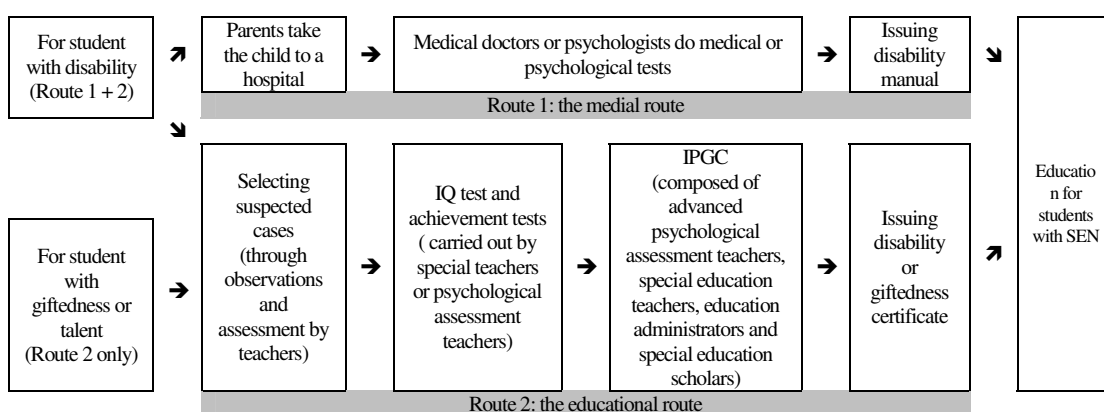


Figure 2.3 The process for identification of students with SEN in Taiwan (Source: revised from Lin & Chang, 2008, p.6)



Students with moderate and severe disabilities are mainly identified by hospitals or the central competent authorities in charge of health. These institutes issue disability manuals after identification (Taiwan Ministry of the Interior, 2004) and this normally happens in the preschool phase. Medical doctors or psychologists are responsible for the identification and classification work. This is the medical route. In order to identify students with SEN who are unable to be identified by the medical route, the Identification Standards for Disabled and Gifted Students (ISDGS) was issued in 1998 (TMOE, 2006b). Pupils with mild disabilities are assessed and identified by the end of Year One in primary school. It is believed that twelve months is long enough for teachers to observe pupils' academic and social performance and to decide if there is any need for special education. Mainstream teachers report these cases by reviewing their academic and social performances in class. Reports on suspected cases are sent and transferred to the special education coordinator (SENCO) and the SENCO asks special teachers or the psychological assessment team to assess the pupils' intelligence by using the Wechsler Intelligence Scale for Children-III (WISC-III). Besides the IQ test, some pupils (whose IQ is below 70/72) also have to take the Chinese Achievement Test and the Mathematics Achievement Test. These two achievement tests serve to assess their academic performance.

Results of the IQ and achievement tests are sent to the Identification, Placement, and Guidance Committee (IPGC) in City or County Bureaus of Education. Professionals such as professors and special teachers, the identified pupils and their parents are invited to attend the IPGC meeting to make the final decisions. Once the decision is made, a disability certificate will be issued for the pupil to prove that the student needs additional educational support. This is the educational route of identification. Both routes serve to identify and classify students with disabilities; as such, a student can receive special education support, as long as they have a disability manual or a disability certificate. As for the identification of gifted and talented students, the ISDGS plays the main role (TMOE, 2006b). The identification criteria are stated clearly in the ISDGS<sup>15</sup> and the criteria for gifted students

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<sup>15</sup> Firstly, to be gifted in general intelligence, two criteria are required: one is a score on individual IQ test two standard deviations (2 SD) or ninety-seven percent ranks (PR 97) above the national mean IQ score and the other is recommendation or animation from professional scholars, teachers and parents (relevant documents must be enclosed). Secondly, to be gifted in scholastic aptitude, students must show superior abilities in academic areas such as language, mathematics, social sciences or natural sciences. There are four criteria for identification and one of these four criteria has to be met: (1) a score on scholar aptitude or achievement tests 2 SD or PR 97 above the national mean IQ score and recommendations from professional scholars, teachers and parents; (2) participating in national/international subject competitions or exhibitions and being awarded for the top three prizes; (3) excellence in independent study and having academic publications and recommendation or animation from professional scholars, teachers and parents (relevant documents must be enclosed). Thirdly, to be gifted in artistic talent, one of the two criteria has to be met: (1) a score on artistic aptitude test 2 SD or PR 97 above the national mean and recommendation or animation from professional scholars, teachers and parents (relevant documents must be enclosed); (2) participating in national/international subject competitions or exhibitions and being awarded for the top three prizes. Fourthly, to be gifted in creativity, one of the two criteria has to be met: (1) a score on creativity test or creativity scale 2 SD

heavily rely upon results of test score, performance, national or international competitions. Because medical doctors cannot identify gifted and talented students, identification of this group of students is only based on the educational route and some social and cultural factors are included in the identification criteria. In the Gifted Education Whitepaper (TMOE, 2008a), there are two more additional categories of students with giftedness produced in the policy document and one is called the ‘culturally-disadvantaged gifted students’. More oddly, this category is not shown in the Act of Special Education. This shows that the two groups of students are not treated equally and identification standards for them are different. Social factors are eliminated from the identification criteria for students with disabilities. This is particularly so for students with learning difficulties. The identification criteria for learning difficulties is stated clearly in Article 10 of ISDGS that,

... this difficulty is not a result caused by disability factors such as physical, intellectual and emotional difficulties or environmental factors such as cultural disadvantage and inappropriate teaching....

However, many students have learning difficulties which are caused by physical, intellectual and emotional difficulties or environmental factors such as cultural disadvantage and inappropriate teaching. Based on the identification process discussed earlier, the numbers and percentages of students with SEN in Taiwan are shown in Table 2.1. The percentage of students with disabilities is 2.05% and the percentage of gifted/talented students is 1.45%. None of the gifted/talented students are identified by the medical route so the percentage of incidence of gifted/talented students is lower than those with disabilities.

Table 2.1 Number and percentage of students with SEN

Level of school	Age	Population	Students with disabilities		Gifted/talented students	
			N	P	N	P
Primary & junior high	6-14	2707254	50954	1.88%	38641	1.43%
Senior high & vocational	15-17	448506	13764	3.07%	10872	2.42%
Primary & secondary	6-17	3155760	64718	<b>2.05%</b>	49513	<b>1.45%</b>

Note: (1) The number is extracted from TMOE (2008b) and the percentage is calculated by the author. (2) N=number; P=percentage.

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or PR 97 above the national mean and recommendation or animation from professional scholars, teachers and parents (relevant documents must be enclosed); (2) participating in national/international subject competitions or exhibitions and being awarded for the top three prizes. Fifthly, to be gifted in leadership, one of the two criteria has to be met: (1) a score on leadership ability test or leadership scale 2 SD or PR 97 above the national mean; (2) and recommendation or animation from professional scholars, teachers, parents or peers (relevant documents must be enclosed). Finally, to be gifted in other special talents, one of the two criteria has to be met: (1) participating in national/international subject competitions or exhibitions and being awarded for the top three prizes; (2) recommendation or animation from professional scholars, teachers and parents (relevant documents must be enclosed).

## Categorisation and labelling

After students with SEN have been differentiated from students without SEN, they are labelled as disabled or gifted citizens. In order to categorise them more precisely and offer them appropriate education, more sophisticated and precise labelling is conferred on them. Twelve categories exist in the Act for citizens with disabilities and six categories<sup>16</sup> for gifted citizens. Interestingly but oddly, in addition to the six categories for the gifted citizens listed in the Act of Special Education, two more categories, 'disabled students with giftedness and talents' and 'socially and culturally disadvantaged students with giftedness and talents', are added in the gifted education whitepaper (TMOE, 2008a, p. 36-37). Therefore, there are 20 categories/labels for students with SEN in total. Besides adding two more categories/labels in the Gifted Education White Paper, these gifted citizens are further labelled as 'national power' and 'the most precious national resource' without giving any definition (TMOE, 2008a, p. 1-2). This label explicitly unmasks how the government allocates value to this group of students since it has the strongest power to do the 'authoritative allocation of values' (Bowe et al., 1992, p. 13). It is suggested by Kogan (1975) that educational policies are related to educational, social, economic and institutional values bases and the economic value is concerned with 'increasing the productivity of the society' (p. 64). Based on this notion, the Taiwanese government obviously emphasises the economic value and allocates the national-resource label onto this gifted group. In the White Paper, TMOE (2008a) claims that gifted students are expected to 'lead the progress of the society' (p. 4). In other words, this gifted group is regarded as a national resource because their task is to lead societal progress. TMOE (2008a, p. 2) further indicates:

Beside students with learning difficulties in general educational environment, gifted students are also another special group of unsatisfied guests who, instead of 'knowing too little', know too much and learn too fast.

Comparing this policy statement with the legislation meeting record (Taiwan Legislative Yuan, 1984), two things can be noticed. First, students with disabilities and giftedness are explicitly perceived as guests in classes in policies and they are a group extremely different from normal students in legislation. Second, gifted education is explicitly regarded as a product and these 'unsatisfied guests' are the privileged customers. There is an

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<sup>16</sup> The 12 categories of disabilities are: mental retardation, visual impairments, hearing impairments, language disorders, physical handicaps, health impairments, severe emotional disturbance, learning disabilities, multiple impairments, autism, development delay and other significant handicaps. The 6 categories of giftedness and talents are: general intelligence, scholastic aptitude, artistic talent, creativity, leadership and other special talents. Another 2 categories are stated in the gifted education policy, they are disabled students with giftedness and talents and socially and culturally disadvantaged students with giftedness and talents. So there are 20 categories/labels for students with SEN in Taiwan.

understanding and perception that they should be excluded from the mainstream education system and educated differently. Although the Taiwan government attempts to create the umbrella term 'gifted/disabled citizens' to embrace all students with different SEN, its labelling terms, unequal identification criteria and separated systems not only render students with SEN exposed to a hazardous progress but also impede the development of inclusion in Taiwan. As far as the labelling issue is concerned, students with disabilities are labelled as disabled citizens and special students but gifted students are labelled as gifted citizens and a precious national resource (TMOE, 1995, 2004 & 2008a). Furthermore, the label 'culturally disadvantaged' is used in the Gifted Education White Paper but not in the Act and policy document for disabled students.

## **Placement**

Once identification, value-allocation, categorisation and labelling has been completed, decisions on placement are made. Various placements for labelled citizens are available, such as special education schools for disabled citizens, independent self-contained special classes, resource class programme, itinerant services, bedside instruction and full-time regular classes. As far as special education schools are concerned, these can be divided into various types, including: schools for the visually impaired, schools for the hearing impaired, schools for the mentally and physically challenged and comprehensive. As for independent self-contained special classes, they are established within mainstream schools. Resource classes accommodate students with SEN (including those with disabilities and giftedness and talents). Students in resource classes spend most of the time in mainstream classes but will be withdrawn part-time to undertake additional training or teaching. For gifted/talented students, there are two programmes: full-time gifted classes and part-time withdrawn resource classes in mainstream schools. The placement for students with SEN may be diverse in the special education system but apparently, the percentage of full-time independent special or gifted classes in mainstream offered for students with SEN is higher than other types of provision (such as the part-time resource class programme) according to Table 2.2. It is noteworthy that the gifted and talented programmes do not exist in any senior vocational school according to the website of the Special Education Transmit Net (<http://www.set.edu.tw>) established by the Taiwan Ministry of Education Special Education Unit. That is, students in senior vocational schools are systemically excluded from the gifted and talented programmes of the special education system. Also, there is no school established particularly for gifted or talented students. Students in these full-time

independent special or gifted classes do not have opportunities to study with students from mainstream classes. Kang, Louett & Haring (2002, p. 12-13) therefore comment that although Taiwanese people value education, this value may not extend to special education so there is still a large proportion of students with severe disabilities being placed in institutions or special schools

Table 2.2 also clearly shows that the majority of special education services are offered for students with intellectual and learning difficulties and physical/sensory impairments (65.66%), while some special education resources are also allocated for gifted and talented students. It can also be seen that the total percentage (59.36%) of disabled and talented citizens in full-time independent placements is higher than those who are placed in non-independent settings. The placement to which students with SEN are allocated also affects how they are perceived and labelled in school or social settings. Based on the real educational situations in schools, teachers, administrators and headteachers often refer to students with disabilities as special students because they are placed in special classes. They refer to students with giftedness and talents as gifted students because they are placed in gifted classes. Put simply, the term ‘special education students’ become an oral label only for students with disabilities but gifted students are known exclusively as gifted students. These labels not only appear in educational arenas but also have spread in discourse to parents, media, professionals and governmental staff of the educational authorities. More precisely, the label of giftedness cannot be contaminated by the label of disability and the distinction of the two labels in verbal language in schools and daily life is very clear. However, when it comes to services, resources, welfare, law and legal issues, the verbal distinction diminishes and students requiring special education support will encompass those with disability and giftedness.

Table 2.2 Percentage of different special education placements in mainstream schools

Category	Type of class	% (Number) of classes
Mentally and physically challenged	(a) Part-time resource classes programme	34.61% (N=1945)
	(b) Full-time independent self-contained special classes and other services (no interaction with mainstream classes)	31.05% (N=1745)
Gifted and talented (none for senior vocational schools)	(c) Part-time resource classes programme	6.03% (N= 339)
	(d) Full-time independent self-contained gifted classes and other services (no interaction with mainstream classes)	28.31% (N=1591)
Total	(a) – (d)	100% (N=5620)

Note: (1) The number is extracted from TMOE (2008b) and the percentage is calculated by the author. (2) The table includes the number of classes for students with SEN from primary level to senior high and vocational level (aged 6-17). (3) Full-time independent special/gifted educational settings=(b)+ (d) =59.36%

## Inclusion

Because the notions of mainstreaming, integration and inclusion continue to be imported from Western cultures to Taiwan, people have tried to rethink the special education service. According to governmental documents (TMOE, 1995, 2004 & 2008), there is no official definition of inclusion in policies and this term is not displayed in the Act of Special Education (Wu et al., 2008). In the Act, the principles of zero rejection, mainstreaming and least restrictive environment may have some connotations regarding inclusion. Table 2.3 shows how inclusion is understood and defined in these policies. According to the policies, resource classes are regarded as part of inclusive practice. Although Wu et al. (2008) contend that ‘...the principle and spirit of inclusion are rooted in the Special Education Act and related regulations’ (p. 18), by calculation, the terms inclusion or inclusive education only appear in short sentences on three pages of two policy documents (TMOE, 1995 & 2008). However, when examining the policies in more detail, it can be found that definitions on inclusion offered by the Act and policies are vague and incoherent.

Table 2.3 Definition and statements of inclusion in law and policy documents

Legal documents		Statements related with inclusion
Law	The Act of Special Education (TMOE, 2004)	All levels of schools shall not deny admission on the ground of the student's physical and/or mental disabilities. (Article 21)
Policies	Report on Education for Individuals with Disabilities (TMOE, 1995)	(1) ...resource classes....and least restrictive environment system, the practice is moving towards the spirit of inclusion...(p. 13) (2) The antonym of inclusion is isolation. Isolation often isolates students with disabilities and makes their accommodation to daily-changing social life more difficult. Simply, it means to let students with disabilities walk into a normal society from a specific institute, transferring from a special school to a mainstream school, entering a mainstream class from a special class. It also refers to mainstreaming and normalisation. (p. 31)
	Gifted Education whitepaper (TMOE, 2008a)	Teaching based on their different aptitudes is a rationale of special education so if the ideal of differentiated learning cannot be implemented, the ideal of inclusive education cannot be achieved. (p. 3)

According to the Act, no definition is given on inclusion. In Article 21, however, the no-rejection admission principle may be regarded as a measure to promote inclusion but it is only concerned with including students with disabilities in a school setting. The inclusion of gifted/talented students is not stated in the Act or in any policy document. By contrast, inclusion contains four levels in the Report on Education for Individuals with Disabilities: inclusion into mainstream class, inclusion into mainstream school, inclusion into society and mainstreaming and normalisation. In the Gifted Education White Paper, however, it merely appears once in the lengthy document and it means a completely different thing. In this document, it refers to differentiated learning and the issue of inclusion of gifted and talented students into mainstream classes is completely neglected in the policy. This neglect can be

attributed to the fact that gifted students are included in mainstream schools so inclusion for them is thought to be unnecessary. Accordingly, many gifted students remain isolated in gifted classes in mainstream schools (also see Table 3) and this is the same as isolation of students in special classes in mainstream schools. The government apparently defines inclusion for the two groups of students differently. In other words, in addition to different identification and labelling systems that are given to the disabled and gifted citizens, definitions of inclusion for them are different as well. Actually, according to some research on inclusion in Taiwan (e.g.: Hung, 2001; Wu, 2007; Wu et al. 2008; Wu, 2009), the inclusion of gifted students into mainstream classes is also an under-researched issue in academia. Therefore, the inclusion of gifted citizens in Taiwan merely refers to including them in mainstream schools and this goal has already been achieved. This has had two results. First, since all gifted students are in mainstream schools now, the inclusive agenda is not necessarily considered in any gifted education policy. Second, since inclusion of gifted students does not refer to including them in mainstream classes, the existence of segregated and independent gifted classes is seen as acceptable and appropriate.

Conversely, however, disabled students in segregated classes are expected to return to mainstream classes. According to Wu (2007) and Wu (2009), there are four models for inclusion in Taiwan: the community-based model, the cooperative model, the reverse inclusion model and the affiliated inclusive programme. The first model included one or two students with disabilities in two non-government mainstream schools but one has closed down. The second model combines students with and without SEN in classes. Mainstream and special teachers are included as well. But this model is implemented in preschool level only. The third model is unique because students without SEN are recruited in special schools to receive education together. Interestingly, the government's policy document clearly states that inclusion means transferring students from special schools to mainstream schools (TMOE, 1995) but this model is done in a completely opposite direction. More interestingly, this model is encouraged and has been implemented in several special schools in Taiwan. Special school is often seen as a segregating setting. If this model can be called inclusion, it is necessary to ask: where are students without SEN being recruited to? Undoubtedly, this reverse inclusion model is including them in the segregated settings. The fourth model only exists in one university-affiliated experimental primary school. A new and completely separated campus is particularly built to implement this model and a university professor is leading this programme. Students with and without SEN are mixed together in classes in a segregated campus away from the main campus. To be included in that

segregated inclusive campus, students must pass tests and be selected and parents must be interviewed. All these four models are in an experimental stage and none of them is taking gifted/talented students into consideration.

## **Characteristics**

Based on the special education system as discussed, several characteristics can be found. Wu (2007) highlights several key characteristics of the Taiwanese special education. These include: combining provision for disabled and gifted pupils in one piece of legislation; and emphasising accountability for special education performance and administration. Special education performance and efficacy in mainstream and special schools can be evaluated by Bureaus of Education or Municipal Bureaus of Education. This special education accountability evaluation normally takes place once every two years. Schools which pass the evaluation can receive subsidies from the Bureaus of Education and also have exemption for the next evaluation. For those which fail the evaluation, sanctions will be imposed including annual evaluation and loss of subsidy. Also, the Ministry of Education can evaluate efficacy of Bureaus of Education and Municipal Bureaus of Education. Other key features include a quota system in special education budgeting, which is executed separately from the mainstream education system (3% of the total education budget at the central government level and 5% at the local). An interdisciplinary approach in diagnosis and treatment is used, including teachers, psychologists, language, physical and occupational therapists and professors. There is a particular focus on gifted education opportunities for students with cultural diversity and disabilities. There is a commitment to promoting the inclusive education programmes and enhancing the expertise of special education personnel.

On the face of it, special education performance standards seem to be structured and rigorous. These may be beneficial for a separated and independent special education system but it may cause various serious concerns in terms of inclusive developments. For example, the government educational budget is limited, special education efficacy and performance must be evaluated to prove the budget is appropriately, efficiently and effectively used, based on the standards made by professionals and government officers. In order to simplify these bureaucratic tasks, these evaluations are mostly done within the special education division in schools and in local and central government. Mainstream teachers and other staff of schools and other mainstream education divisions of government education sectors are rarely involved in these evaluations. This approach is coherent with the highly dichotomised



education structure but this offers little opportunity for the general education system to have conversation with the special education system. In addition, there is no official definition or code of practice available for inclusive work so inclusive programmes use different definitions, in different ways and for different purposes. As long as disabled students are mixed with students without disabilities, then it is assumed that inclusion is taking place. Furthermore, the government pays particular attention to providing gifted education opportunities for students with cultural diversity and disabilities. It, however, does not recognise the identification of students with disabilities caused by the culturally-disadvantaging factors. In short, it has been politically claimed that the development and establishment of both the special and gifted education systems is based on the principle of equality but both disabled and gifted citizens are treated differently when comparing legislative and policy documents and practices. More specifically, the identification systems, the labels, the value system, the policies, the placement and practices and definitions on inclusion are offered differently for them. Table 2.4 clearly illustrates the difference. In addition, one policy White Paper on gifted education has been published recently, but there has been no updated policy White Paper on inclusion, inclusive education and education for students with disabilities.

Table 2.4 A comparison of law, policy and practice related with special education and inclusion in Taiwan

Students	Law			Policy		Practice
	Identification	Big labels	Small labels	Documents	Definition of inclusion	
With disabilities	Educational and medical routes	(1) Disabled citizens (2) Special students	12 labels	Report on Education for Individuals with Disabilities (TMOE, 1995)	(1) Walk into a normal society from a specific institute (2) Transferring from a special school to a mainstream school (3) Entering a mainstream class from a special class	(1) Special classes (2) Resource classes (3) Special schools (4) Reverse inclusion (adding students without SEN into special schools)
With giftedness & talents	Educational route only	(1) Gifted citizens (2) National resource (3) Unsatisfied guests	8 labels	Gifted Education Whitepaper (MOE, 2008)	Differentiated learning in mainstream schools	(1) Gifted classes (2) Resource classes

## THE INFLUENCE OF CONFUCIANISM AND CAPITALISM ON EDUCATION

The education system is not produced as a mechanical structure in vacuum. It contains man-made manipulation of educational bureaucrats and affected by ideological underpinnings. As noted earlier, there are two major ideological powers dominating the Taiwanese education system: one is Western capitalism and the other the Eastern Confucianism. Having an umbilical cord relationship with the US and taking account of this capitalist country's leading role in the world, the American education model is imported as a foundation for the

Taiwanese education system. Due to this importation, various capitalist notions such as cost-and-profit, marketisation and investment were introduced into the education system. Education thus is regarded as an enterprise, a commodity and a free market. When education is related to capitalism, competition and selection is inevitable. The impact of capitalism on Taiwan's general and special education system is tremendous. In the following sections, the influence of capitalism and Confucianism is analysed in terms of three aspects: the education administration system, the general system and the special education system.

### **Influence on the Education Administration System**

The features of Confucianism, as mentioned in Chapter 1, profoundly affect the education administration bureaucratic system. Because Taiwanese people revere authority, systems established by professionals and powerful people are highly respected. Once a system is established, various rituals, routines or traditions will be built for people to follow. Building routines is a way of promoting efficiency in bureaucracy and this may help simplify complicated tasks (Lipsky, 1976 & 1980). Once routines are established, they become traditions to be worshipped. Worshipping traditions or routines and revering authority then become a collective belief or ideology in Taiwanese educational administrative bureaucracy. This ideology is reinforced with the help of Confucian education and further incarnated in real life. In the education arena, novice teachers are expected to respect and defer to senior teachers, staff and headteachers in particular. Teachers, headteachers or educational practitioners respect those who are more knowledgeable and powerful than themselves. Being subordinate and obedient to powerful people is appreciated. It is the Confucian ideological influence that individual rights or welfare sometimes may be sacrificed to meet the collectivistic needs and benefits of a group. Influenced by capitalism, a novice education administrator or bureaucrat may start to fight for his own personal rights and welfare. However, the authoritarian nature of capitalism and the Confucian tradition of respecting the seniors and the collectivistic powers affect him as well. After discretion, following the routines and traditions and surrendering to the structure and class rather than conflicting with it is the best policy for an education administrative bureaucrat. His challenging voice may gradually decrease or diminish. The educational administrators and bureaucrats thus establish a non-challenging climate in the workplace. This neutral climate, on the one hand, can be regarded as compromising between individualist and collectivist benefits and between Confucianism and capitalism. On the other hand, this can be seen as an internal controlling mechanism as well.

After the Martial Law Period, Taiwanese society demanded democracy in order to wipe away the terror of long-term collectivist control. Witnessing the economic and materialist benefits brought by capitalism, people started to voice concerns about their individual rights and revering capitalism without noticing its authoritarian nature. Noticing the benefits and drawbacks of capitalism, the bureaucrats combined capitalist competition mechanisms with the educational competition mechanisms stemming from the ancient Chinese imperial examination system to improve Taiwan's examination mechanisms. Under the cloak of capitalist benefits, people, particularly those from less advantaged groups, believed that educational competition could result in economic benefits. This made people become more convinced of the Confucian notion of valuing education. The exam system can be seen as an external controlling mechanism. This system may not disappear because, firstly, elites and bureaucrats of the upper class understand that exams secure their vested interest positions. Secondly, they also know these capitalist techniques can make the selection mechanism more competitive. As such, this becomes more consolidated by manipulating capitalism and Confucianism. This capitalist mechanism then becomes a tradition to be worshipped by bureaucrats.

### **Influence on the General Education System**

Since Taiwan's education administrative hierarchical system may be a product of the interplay between capitalism and Confucianism, the general education system produced by the educational bureaucrats inevitably is affected by the two ideological forces. One of the influences is from the most famous discourses proposed by Confucius: you-jiao-wu-lei (有教無類). It challenges the concept that education is an inherited privilege belonging to noble people in ancient Chinese feudal society. Without clear definition on his original discourse, however, this discourse is open for interpretation. For instance, two distinguished Sinologists translate this discourse differently: Lau translates it into 'In instruction there are no categories' (Confucius, 1970) while Legge translates it into 'In teaching there should be no distinction of classes' (Confucius, 2005). The former translation focuses on its literal meaning while the latter takes its historical context into account. Their translation not only shows that 'lei (類)' can be understood as categories or classes but also suggests that there are classes or categories in Confucius's era. Within the Taiwanese context, this open-defined discourse can support the value of anti-discrimination and equal educational rights so it becomes the philosophical underpinning for the general education system. This lofty

discourse can be applied to every level of education. In the compulsory level, students who are categorised as disabled and gifted citizens can receive education. After the compulsory level, students who pass the national exams are categorised as senior high or senior vocational school students. They can receive education as well. However, emphasising **credentialism** is another common phenomenon of the Taiwanese society (Chou & Ho, 2007). This is a result of interplay of Confucianism and capitalism. Keen on importing Western values, the concept of meritocracy from the West is introduced to Taiwan and this strengthens the power of credentialism. **Meritocracy** refers to an ideology that a person's achievement is highly correlated with his intelligence (Young, 1976). It is also regarded as a crucial factor contributing to **elitism**. Since Taiwan is a capitalistic country like the US and the US education model is imported to Taiwan, the cult of meritocratic ideology as a surviving and competing mechanism in a capitalist society (Bowles & Gintis, 1977) can be found in Taiwan. Therefore, as long as a person can pass examinations, he takes the credentials and merits in two aspects. As far as the meritocratic aspect is concerned, he/she will be appraised as intelligent or gifted. As for the elitist aspect, he/she is believed to have a high social status and bright future and may enter the elite world when holding a good credential such as a good qualification. In this sense, meritocracy and credentialism are important elements of elitism: the former is more related with IQ determinism while the latter is focused on the process. The three concepts (credentialism, meritocracy and elitism) continue interacting with Confucianism and capitalism in Taiwan's educational arenas. As a result, people regard the process of education as a ladder leading to life success so they continue taking exams and chasing higher degrees, more diplomas, licenses or other credentials. Even though they may not enter the elite world by holding the credentials, at least they are not the worst losers in the competition. As such, students are encouraged to study hard in order to take exams to join the gifted classes.

The gifted class is regarded as a place to produce and reproduce the elite class for the future so students are encouraged to enter. The neo-Marxists Bowles & Gintis (1977), however, criticise that 'The ideology of equal educational opportunity and meritocracy is precisely such a contradictory mechanism' and the meritocracy cannot help enhance individual economic success based on the US context (p. 103). Applying their critique to Taiwan's context, the education administrative bureaucrats seem to produce a meritocratic structure to reproduce inequality in society. This structure contributes little to individual economic success; in fact, this structure merely produces winners and losers of academic competition. This unequal structure becomes more consolidated with the help of the Confucian belief of

valuing education. The original concept of Confucian discourse is not related to competition but its meaning and interpretation has been changed via social construction, particularly mixed with capitalism. There may be no causal relationship between Confucianism, capitalism and credentialism; however, the phenomenon of overly chasing credentials may be regarded as an interactive effect of the two ideologies. Interestingly, the Taiwanese government and the exam-winner bureaucrats declare that they make efforts to tackle the problem of overemphasising credentialism and meritocracy; but meanwhile, they create a highly competitive and selective examination mechanism for students.

Another feature of the American education model is emphasising individualism. A student's individual difference and his personal competition ability are encouraged. Influenced by the competitive nature of capitalism and the collectivist nature of Confucianism, competition is transformed into a collectivist belief in Taiwan. As a result, a consensus on competition and chasing credentials emerges between students. A student may face the tension: on the one hand, he may want to improve his own ability and compete with himself only; on the other however, there is a collectivistic competing atmosphere stemming from his peer group, the whole class, the school as well as parents' high expectations. This tension often results in high academic competitive pressure. Influenced by capitalism, Stone (1999) argues that a child is easily conceptualised as lineage capital and economic capital in China. As a matter of fact, this conceptualisation also exists in Taiwan. All these phenomena I have described offer capitalists the best market survey database to open a new free market: crammer schools (see Figure 2.4). Crammer schools are supported by a number of fundamental social beliefs. Firstly, everyone is reluctant to be labelled as a loser or student with learning disability. Secondly, parents work hard in the capitalist society. They arrive home late so have no time to help their children with assignments. Thirdly, since children are often viewed as lineage capitals and economic capitals by parents, parents will invest in them in this capitalist society. Fourthly, exams, selection and academic competition occupy most of a student's learning time. For students, they believe that they may learn to be more competitive and not to being labelled as a learning disability by attending crammer schools. For businessmen, they make profits and provide more learning opportunities after school. Under the win-win and demand-and-supply principles, thousands of after-school crammer schools and care centres for exams, music, art, certificates, skills and languages are available in the marketplace from kindergarten to postgraduate level. Seats for these cram schools are highly demanded by consumers so cram schools in Taiwan are as numerous as supermarkets<sup>17</sup>. In big cities, some

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<sup>17</sup> According to the National Short-Term Bushiban information management system (<http://bsb.edu.tw/>) designed by Kaohsiung

streets are crowded with crammer schools so they are unofficially named as crammer school streets (Figure 2.4 shows the phenomenon of cramming in Taiwan).

When in childhood, parents are taught to be competitive by attending crammer schools for extra education so they reproduce the same mechanism on their social capital. Ironically, crammer schools for teacher exams and national civil servant exams are also available in the marketplace. In other words, students attend crammer schools for school or national exams. Teacher certificate examinees go cramming for teacher exams. After being a teacher, he/she may choose the administrative route to be a dean or a headteacher. Alternatively, he/she can choose the academic route to do a postgraduate degree. Crammer schools for postgraduate entrance exams are available. These exam systems are produced by educational bureaucrats. If a person wants to be an educational bureaucrat, he/she must pass the rigorous national civil servant exams as well. In short, this competitive education mechanism is influenced by Confucianism and capitalism and it is composed of the selective and competitive exam system (the gear), the schooling system (the gear), capitalistic power (the lubricant) and the educational bureaucrats (the engineers). This vicious circle continues producing social pressure and control in Taiwan.



Figure 2.4 Cramming after schooling

Note: The left photo shows that students are queuing to enrol in a cram school. The middle photo shows that students squeeze in a class of one cram school. The right photo shows that students wear military uniforms in one cram school and prepare for the national competence exam. Source: <http://news.epochtimes.com.tw/6/12/30/44607.htm>; <http://www.rulin.com.tw/>; <http://www.jackhome.com.tw/>

## **Influence on the Special Education System**

Besides general education, the special education system is also affected by capitalism and Confucianism. Confucian ideology influences special education in Asia-Pacific countries (Forlin & Lian, 2008; Kang, et al., 2002; Chen, & Lu, 1994) and Taiwan is no exception. Confucius's educational discourse, 'In instruction/ teaching there should be no distinction of categories/classes', again, is purposefully adopted as the educational philosophical

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City Government Education Bureau, there are 18,231 legal cram schools (bushiban) in Taiwan.

underpinning for the special education system. The Act of Special Education, the identification standard for students with SEN and two special education policies mention little about the social class of students (TMOE, 2004; TMOE, 2006; TMOE, 1995 & 2008a); in this regard, the term ‘lei (類)’ of the Confucian discourse used in the government’s policy papers is interpreted as ‘categories’ rather than ‘classes’. This discourse also appears in one important academic journal<sup>18</sup> published in Taiwan but no research is done to discuss the appropriateness of using this discourse as a rationale for special education. Confucian discourse, in fact, is better understood as ‘classes’ rather than ‘categories’ based on two pieces of evidence. Firstly, as mentioned already, the reason why Confucius is respectful and regarded as the Chinese education pioneer is because he challenges the situation of education being privileged by noble people in high social class. It is not because he challenges the phenomenon that disabled or gifted students are excluded from the education system. Confucius does not discuss the concept of disability or giftedness in *The Analects* at all. So, even if the term ‘lei (類)’ can be understood and translated as ‘categories’, the categories are not referring to pupils categorised as disabled or gifted and talented. Secondly, according to other Confucian discourses (also see Table 2.5), he clearly suggested that people can be categorised according to their innate knowledge and offering them different teaching. Precisely, he divided people into three categories and levels (high-median-low) based on their innate knowledge.

Table 2.5 Sinologists’ translation of Confucius’ educational discourse

Sinologist	D.C. Lau’s (Chinese scholar) translation	J. Legge’s (Scottish scholar) translation
Quote 1	Those who are born with knowledge are the highest. Next come those who attain knowledge through study. Next again come those who turn to study after having been vexed by difficulties. The common people, in so far as they make no effort to study even after having been vexed by difficulties, are the lowest. (Confucius, 1970, p. 140)	Those who are born with the possession of knowledge are the highest class of men. Those who learn, and so, readily, get possession of knowledge, are the next. Those who are dull and stupid, and yet compass the learning, are another class next to these. As to those who are dull and stupid and yet do not learn; - they are the lowest of people’. (Confucius, 2005, p. 313-314)
Quote 2	You can tell those who are above average about the best, but not those who are below average. (Confucius, 1970, p. 84)	To those whose talents are above mediocrity, the highest subjects may be announced. To those who are below mediocrity, the highest subjects may not be announced. (Confucius, 2005, p. 191)

Again, he does not define what he means by innate knowledge. These discourses regarding categorisation appear in textbooks but are never displayed in law, policy or academic publications. This means that Confucius’s notion of categorisation based on individual innate knowledge is not taken into consideration when powerful people are producing official documents. Interestingly, the government categorises students as disabled/gifted citizens and

<sup>18</sup> The journal *Special Education Quarterly* is published by one distinguished university in Taiwan.

gives them labels by legislation. Since Taiwanese society adores authority and stresses collectivism, as a result, the selected educational discourse 'In teaching/instruction there is no distinction of categories/classes' made by Confucius and articulated by the government and professionals is legitimated as a collectivistic ideology. When Confucius's concept of categories is understood as individuals with different innate knowledge by the powerful educational bureaucrats, the result of identifying students based on their innate abilities without taking social context into account is not surprising. The types and categories of people listed in the Act and the policies (20 in total) are far more than Confucius's categorisation (3 in total). In terms of the way of doing categorisation and labelling, Confucius focuses more on an individual's innate knowledge. The Act of Special Education, however, includes more dimensions of categorisation and labelling. For the disabled group, innate mental and physical abilities need to be taken into consideration. As for the gifted group, involvement of social members (including parents, peers' teachers and professionals) is taken into account in addition to students' high innate mental or physical abilities.

As mentioned previously, categorisation is necessary for bureaucracy because it helps simplify complicated tasks (Lipsky, 1976 & 1980). This simplification, actually, is an important element in capitalism because it can enhance efficiency. In order to make educational bureaucratic tasks work more efficiently, more categories are produced for disabled and gifted students. Then, bureaucrats put labels and allocate values on them. By doing so, stereotypes are formulated as well. Dichotomising students with SEN into two groups makes the disabled group more disadvantaged because they are regarded as a non-profit-making group. Comparatively, gifted education is strongly connected with the capitalist market. The Taiwanese government stereotypes gifted students as a national resource and they are expected to lead the society in the future after they grow up. Obviously, this act of labelling and investment is reciprocal. Bureaucrats identify and create the label of giftedness. They objectify them as forms of capital and invest in them. After they grow up, these bearers of gifted capital gain elite positions and continue reproducing bureaucrats' controlling positions.

The impact of capitalism on gifted education is far greater than its impact on special education. The identification of a Taiwanese gifted student mainly relies on various test scores and competition results and this student is regarded as national capital and a national resource. Again, as argued by Bowles & Gintis (1977), the cult of meritocratic ideology is a mechanism of survival in the capitalist world. Based on their notion, giftedness seems to



become a symbol and a label of cult in a capitalist society since giftedness is highly correlated with meritocracy. If their assumption that ‘the yardstick of educational meritocracy – test scores – contribute surprisingly little to individual economic success’ is true (p. 103), the highly competitive exam mechanism created by Taiwanese educational bureaucrats merely contributes to individual economic failure. Interestingly however, the majority of gifted students are more likely to have better careers and income after their graduation. Whether these gifted human resources make contributions to the entire societal economic success is open to question. Nevertheless, people continue to worship the label of giftedness and believe that they may gain economic benefits by succeeding in competitive exams. The government produces very unequal systems by creating categories of disability and giftedness and then segregating pupils by legislation and policies. It also produces a gifted education mechanism to encourage competition and exercise more control over society. The label of giftedness and the cult of giftedness and meritocracy, however, produce a group of winners in the marketplace: they are crammer school owners. As businessmen noticing the phenomenon, they then largely use the word ‘giftedness’ on their advertisement or commercial brands. A large proportion of students believe that a child’s giftedness can be activated, inspired and cultivated via continuous education and diligent studying. Giftedness, the labelling term, becomes a free advertisement for cram schools. That is, putting the word giftedness on the signboard of crammer schools can help attract more customers. In contrast, a public or national school for gifted and talented pupils can never be established but there are public or national special schools for the disabled citizens. In the marketplace, there are no crammer schools for students with disabilities. However, those who are regarded as losers at school exams and those who are labelled as students with learning disabilities and their parents also try to find ways to get rid of the label and escape from this labelled class. Some parents of children with disabilities who can afford to pay the extra fee also send them to crammer schools for extra learning, believing that these children’s academic achievement can be improved. In short, under the control of bureaucracy, people can be easily divided, selected, labelled and segregated as the disabled, the normal and the gifted groups. The gifted label becomes a controlling mechanism to encourage students to compete fiercely so they can jump into the gifted class and have a brighter future. Using the policy’s language (TMOE, 2008a), they have the opportunity to lead the citizens in the future. The disabled label becomes another controlling mechanism to encourage students to compete so as not to be labelled or categorised as the disabled or normal groups. The dichotomised special education system (disabled vs. gifted education) is merely producing more competition between winners and losers and producing more labelled citizens rather than encouraging inclusion.

## SUMMARY

Figure 2.5 illustrates how Taiwanese general and special education systems are developed and influenced by various factors. Capitalism and Confucianism influence the two systems as well as the educational administrative system significantly. As far as the educational administrative system is concerned, the capitalistic concepts such as efficiency, capital, investment and competition have influence on the bureaucracy. Along with the Confucian features of revering authority, worshipping traditions and stressing collectivism, these educational bureaucrats need to find an eclectic way to establish the whole education system. As far as the general education is concerned, the concept of competition stemming from the ancient Chinese imperial exam system and capitalism is reinforced by the Confucian belief of valuing education. The influence of capitalism and Confucianism on the educational bureaucracy and general education further has an enormous impact on the special education system. For managerial and bureaucratic purposes, the special education system is separated from the general education system. In the special education system, education for the disabled citizens and education for the gifted citizens are separated again. The policies, the identification work, the labelling system, the values allocated on them and the placements are different and unequal. Some UK educational sociologists regard the birth of special education for disabled people as a product of vested interest groups (Barton & Tomlinson, 1981; Tomlinson, 1982). According to the foregoing discussion, the birth of special education in Taiwan is the most vivid example of their assertion. This assertion can be also applied to the birth of gifted education in Taiwan as it is one part of the big special education system and many powerful people are involved in the process. The segmented education system is a huge threat for inclusion in Taiwan as these segmented systems continue evolving and developing separately with very weak linkage between the parts of the system.

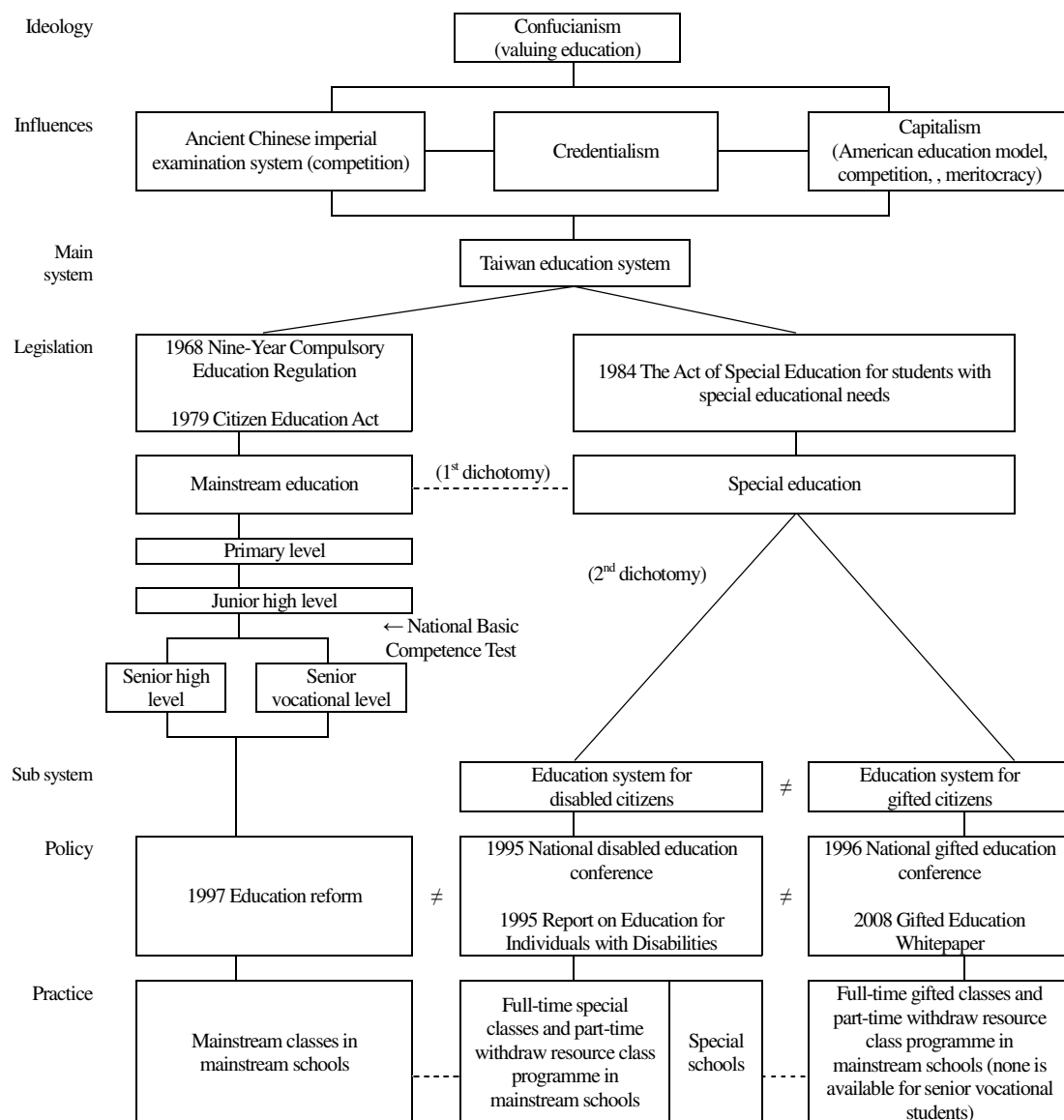


Figure 2.5 An overview on Taiwan's general and special education system ( ----- refers to a weak linkage; ≠ refers to very weak linkage)

# **CHAPTER THREE**

## **REVIEW OF THEORIES AND LITERATURE**

### **INTRODUCTION**

This tripartite chapter deals with theories and empirical studies regarding inclusion. The previous two chapters have shown that capitalist ideologies have become prominent within the entire Taiwanese education structure and the independent special and gifted education systems have been reinforced. Although the Taiwanese special education system (including gifted education) has been established for decades, sociological perspectives on special and inclusive education development are scarce. Based on this background, the first section largely draws on Western literature to present a historical and sociological account of the Taiwanese special education policy and practice. It is argued that separate special and gifted education systems are underpinned by the functionalist social paradigm which stresses the management of special education and creates structural barriers to inclusion. Influenced by neo-Marxist and critical theorist perspectives, the critique of the functionalist paradigm in special and gifted education is also discussed in this section. In the second section, theories of inclusion are reviewed. This section also discusses the influence of the functionalist paradigm on the implementation of inclusion and offers critique on the current inclusive practice in Taiwan. Because headteachers are the key persons to receive policy from the government and promote and implement inclusion at schools and within the entire education system, examining their views on inclusion is significant. The last section therefore analyses empirical studies regarding their attitudes and views on inclusion.

### **SOCIOLOGICAL ACCOUNTS OF THE SPECIAL EDUCATION POLICY AND PRACTICE**

#### **Sociological Framework of Special Education**

Based on her previous work on theories of disabilities (Riddell, 1996) and a large body of Western literature, Riddell (2007) discusses epistemological underpinnings of five approaches to demonstrate how special education policy and practice agenda is shaped within this framework. First, the essentialist or individualist approach is strongly influenced by a medical model of disability which regards mental or physical deficits as being rooted in

the individual. Second, in order to make public sectors work more efficiently, bureaucracy in special education becomes necessary in terms of the managerialist or system-based approach. Measurement, performance and accountability of special education then are important because they have influence on the allocation of funds. The two approaches can be further grouped as the functionalist paradigm. This paradigm is rooted in the ideas of the French sociologist Emile Durkheim (Blackledge & Hunt, 1993; Riddell, 2007). For functionalists, society is like the human body so how to make the body function effectively and smoothly is important. Every society is believed to have a consensus on certain values and norms (Blackledge & Hunt, 1993). In other words, societal stability and cohesion are desirable social states and conflicts which threatens this stability, cohesion and order are to be repressed (Riddell, 2007). Due to the pragmatic nature of this paradigm, it is a traditional force dominating special education and this paradigm is more favoured by parents, practitioners and policymakers (p. 43). Translating this paradigm into practice, diagnosis and assessment of students with SEN and individualised educational programmes (IEPs) and special education administration and management are needed. However, she argues that this paradigm pays little attention to identifying different underlying social forces of constructing particular individuals and groups.

Third, the materialist or social policy approach focuses on understanding the relationship between education and reproduction of social relations within capitalism. Riddell (2007) cites the work of Armstrong (2003) and suggests that special education may become 'a convenient tool for legitimising discrimination, racism and the lack of opportunities generally for young people' (p. 40). This notion implies that if this implicit socioeconomic determinism approach is being taken into consideration in policymaking or translated into practice, the education system may run the risk of playing the role of another unequal reproduction mechanism in the meritocratic and credentialistic capitalist society. This is also some neo-Marxist researchers' main concern (e.g. Bowles & Gintis, 1977). Fourth, the social constructionist approach is influenced by the interpretive paradigm and it brings a socio-cultural element in special education which helps understand creation and negotiation of categories in special education. Fifth, the civil-rights approach is developed via the 'adult-dominated disability movement' and influenced by the 'social model of disability' (Riddell, 2007, p. 42). This approach has a significant impact on political progress such as legislation for disabled people. These last three approaches are grouped as the critical paradigm. As argued by Riddell (2007), this paradigm sees conflict and challenges as 'manifestations of unequal power relations or social interactions' (p. 36).

This research is intended to be situated within the critical paradigm and critique of the functionalist paradigm and its influence on special and gifted education is important. Firstly, the entire Taiwanese special and gifted education development has been dominated by the traditional functionalist paradigm for decades. Influenced by the Confucian thinking of respecting authority, the voice of challenging the functionalist paradigm and taken-for-granted rational knowledge in the Taiwanese special and gifted education field is underdeveloped. Although disability and giftedness are claimed to be constructs or creations of the rationalised capitalist society by many researchers<sup>19</sup>, the voice of the critical paradigm is very weak for shaping Taiwanese special and gifted education policy and practice. Secondly, as discussed in Chapter Two, Western capitalism has had an effect on the entire education system. Inspired and influenced by neo-Marxist and critical theorist perspectives on special education (e.g. Tomlinson, 1982, 1998 & 2008), moving Taiwanese special education development from the functionalist to a critical paradigm is significant because the critical paradigm not only offers more diverse perspectives for special education development in Taiwan, but also helps in examining inequality. According to Ritzer (1992), critical theory could be regarded as a neo-Marxist perspective and it was developed by Frankfurt School scholars from 1923. These scholars and their followers tried to explain ‘the relationships that link individuals, culture, politics, the economy and society – and they wish to examine not only the way relationships of superiority and inferiority came about, but how these relationships could be changed and transformed’ (Tomlinson, 1988, p. 46). Challenging those taken-for-granted rationalities is the key task of this school. It is also because of the influence of the critical theory perspective that critique becomes essential for this research. Therefore, critique of the influence of the functionalist paradigm with particular reference to managerialism in special education is also discussed in the following sections.

### **Critique of the Functionalist Paradigm in Special Education**

Managerialism is an ideology used to increase ‘efficiency, effectiveness and value for money’ in public services whilst bureaucracy is a hierarchical structure stressing rules, accuracy and consistency (Riddell, 2002, p.13). The two mechanisms are often connected. Influenced by the essentialist views of students with SEN, applying these capitalist mechanisms in special education is regarded as useful in order to make the educational structure work more smoothly. The comprehensive deployment of this functionalist

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<sup>19</sup> Such as Oliver (1989 & 1990), Tomlinson (1982), Borland (1997 & 2003), Shapon-Shevin (1987, 1993 & 1996) and Margolin (1993)

paradigm also helps de-politicise issues surrounding special and gifted education. However, the new social and economic order continuously changes, and the system of special education is also being challenged (Armstrong, 2003). In terms of education structure, a rational stratified system can assist in managing diversities within it but it also constrains the flexibility, mobility and inclusiveness of the structure at the same time. Armstrong (2003, p. 75) cites the work of Bauman (1990) to indicate that rationality is a two-edged sword. Rationality helps people to gain more control but it also constrains their freedom. That is, irrationality often emerges from these taken-for-granted rationalities<sup>20</sup>. For instance, mechanisms within the fields of special and gifted education such as simplification of work or routines to foster efficiency, specialisation of work, rationalisation, medicalisation of problems and client differentiation for allocating scarce resources seem to be rational. Simplification is required for 'simple work' which can be easily rationalised or task-analysed into routine jobs and this is like the notion of 'assembly line' (Skrtic, 1991, p. 86). Conversely, specialisation is required for more 'complex work'. The two mechanisms are crucial elements of professionalisation. However, these mechanisms correspond with the capitalist ideology of managerialism which puts emphasis on efficiency and value for money. The serious concern here is the quality of special and gifted education, and whether the rational functionalist approach deployed in special and gifted education systems actually improves educational quality for all. Furthermore, whether these iron-caged mechanisms help to facilitate, promote and implement inclusion is a more long-term concern. This is a particularly crucial issue in this resource-limited capitalist society.

Focusing on the establishment of the early segregated British special education, Tomlinson (1982) adopted a critical theorist's position, challenging the humanitarian perspective as the means of legitimating special education. She further indicates that an advanced capitalist society requires a pool of labour to maximise profit but disabled people may be feared as a

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<sup>20</sup> Ritzer (2000) indicates that the society is McDonaldised because of its inevitable emphasis on efficiency, quantification and calculability, predictability and control through nonhuman technology. Efficiency refers to that time and speed is crucial and should be managed in the capitalist society. Quantification and calculability highlights the feature of stressing number and quantities in our daily life rather than paying attention to the quality. This principle allows for 'comparability and, therefore, for competition, which rewards the winners and shows up the losers' (Hartley, 1994, p.411). Predictability refers to that people can expect and predict the services which they expect to have in the capitalist society. According to Ritzer, a rationalised society puts emphasis on 'discipline, order, systematisation, formulation, routine, consistency and methodical operation' in order to achieve predictability (p. 83) and this is like an iron cage for society. In the competitive marketplace, more dehumanised technologies, machines or mechanism are created in the process of producing products for maximising profits and accelerating speed and efficiency. Doing so, people and rationalised process can be controlled and this is similar to the concept assembly line proposed by Henry Ford (Hartley, 1994). Rationality or the four features of modern society is a Janus-faced concept. On the one hand, the social life can be improved under the aegis of bureaucracy and rationality. On the other hand, however, rationality is like an iron cage which mechanically ossifies the society. This iron cage or rational systems inevitably spawn irrationalities, another feature of modern society, which reflects that irrationalities and disadvantages will come along with the process of rationalisation (e.g. The establishment of bureaucracy can help enhance efficiency of administrative tasks but it may also legitimate and accelerate the powerful people's controlling ideology.)

potential drain on the state. In order to 'rationalise the resulting "uselessness" of many of its citizens', special education becomes the best legitimating and rationalised means to deal with the so-called uselessness (Tomlinson, 1988, p. 48) or 'the undesirable difference' (Freidson, 1965, p. 72). This one dimensional rationality (which has been called as an iron cage) has always been a serious issue of special education (Tomlinson, 1981, 1982 & 1988). Fitting her comment on rationality in special education into Riddell's sociological framework, her critique not only reflects the domination of essentialist approaches but also reveals the problems of managerialist approaches in special education policymaking and practice. In terms of the managerial perspective, robust bureaucratic mechanisms are expected to be established so that the payback for investment in these useless citizens may be calculated. The identification of disabled students should also be professionalised and rationalised with efficient, calculable, predictable and dehumanised assessments and tests. Investment in these useless citizens and accountability of services and performance must be evaluated. In order to achieve managerialist rationality, performance measurement is essential for the public sector (Townley, et al., 2003). This managerialist notion has developed as the notion of risk management nowadays. This helps maintain social order and social control of the useless.

### **Critique of the Functionalist Paradigm in Gifted Education**

Since gifted education is often included in the tent of special education system, the dominance of the functionalist paradigm on the development of gifted education is powerful and prevailing. Influenced by this paradigm and supported by the development of IQ testing and psychological theories of giftedness, the concept of giftedness, similar to disability, is viewed as innate ability resided within an individual. It is this assumption that gifted students' different educational needs are taken into concern by its advocates such as parents, educators and policy makers. Besides, in order to manage the entire education system more effectively and smoothly and influenced by the ideological view of investing human capital, educational provisions for gifted and talented students emerge and become more legitimate and rationalised. Compared with the development of sociological research in disability and special education, the number of sociological studies in gifted education is not abundant enough. However, some researchers remain to take sociological perspectives to critically examine the notion of giftedness and gifted education. These perspectives include the social constructionist and the neo-Marxist perspectives. Both Western and Asian researchers have



applied the social constructionist perspectives to explain the notion of giftedness and gifted education (e. g., Borland, 1997 & 2003; Sapon-Shevin, 1987, 1993, 1996 & 2003; Chaw & Ching, 2001). Instead of viewing giftedness as a value-free and neutral concept, these researchers argue that giftedness is socially constructed. They also contend that the implementation of gifted education has raised crucial and controversial educational issues such as inequality, injustice, meritocracy and elitism. For instance, Borland (2003) cites the work of Hurn (1993) to indicate that schools defined within the functionalist paradigm are responsible for sorting and selection of talents. Gifted education is perhaps the best example to reinforce this selection mechanism within a capitalist society. Borland also comments that using these sorting and selective mechanisms to do the simplistic dichotomisation of people into 'two distinct, mutually exclusive groups, the gifted and the rest (the average? the nongifted? the ungifted?)' is contrary to our real life experience (p. 111). Chaw & Ching (2001) further argue that the cult of genius and giftedness is a result of modernisation. Under the climate of individualism reinforced by capitalism, the concept of individual meritocracy becomes more rationalised. They further reveal their serious concern that Chinese people are more obsessed with notions such as genius, intelligence, meritocracy and credentialism than the West. Although they do not explain why Chinese people are more obsessed with these notions, Chinese collective Confucian belief in education may be one of the strong controlling powers leading to this obsession.

Gifted education is claimed to offer gifted students a more challenging and appropriate curriculum and this is believed to do good for them. Grace & Lewellyn (1963), however, have clearly indicated that '...when we stress "challenge", we actually accentuate the distance between gifted and normal children...' (p. 331). Their statement implies the hidden concern of class stratification and hidden inequality within schools. Focusing on the issues of inequality, elitism and reproduction, neo-Marxist criticisms on gifted education is even more radical. Although the number of studies adopting the neo-Marxist perspective to explain giftedness and gifted education is limited, it still can be found in some articles. For instance, Howley (1986) criticises that the early development of gifted education in the US is too closely linked with meritocracy and elitism. Not only may this type of education function as 'the elitist provision of advantages to the advantaged' but also to 'maintain the structural position of the ruling elite' (p. 117-118). Ironically however, these students selected for gifted programmes may not in fact become powerful in the economic structure or contribute

to individual economic success (Howley, 1986; Bowles & Gintis, 1977). On the other hand, Tomlinson (2008) takes the critical theorist stance to highlight the elitist ideology situated within the English government's gifted education policy. Not only her criticism is meant to highlight the nature of inequality and elitism of gifted education, but also to uncover the government's meritocratic ideology driven by the discourse of competitiveness. Overall, the arguments presented above are all trying to present some negative effects of functionalism on gifted education.

## **THEORIES OF INCLUSION**

Rationally speaking, creators of the stratified education structure should be capable of harnessing the structure. The foregoing discussion, however, reveals one concern: continually influenced by capitalist ideologies, the structure constrains those within it. This concern is particularly significant for the capitalist and newly-democratised Taiwan. Its entire education system requires a more flexible and inclusive structure to accommodate diverse students in this changing society. Inclusion, a notion of supporting the merging of special and general education systems, seems to be a better mechanism for emancipating the stratified structure which has become stuck in an iron cage. The following sections elaborate theories of inclusion within this capitalist society.

### **Conceptual and Operational Definitions of Inclusion**

#### *Conceptual definition*

It has been suggested that inclusion has evolved from notions of normalisation, mainstreaming and integration<sup>21</sup> but the four notions are not interchangeable because their values, underpinnings and practice are different. Inclusion begins with the assumption of including 'all' students in mainstream education settings. It is also based on a value system which welcomes and celebrates diversity (Barton, 1999; Murphy, 1996; Shapon-Shevin, 1994; Lipsky & Gartner, 1999; Mittler, 2000) so inclusive education is regarded as integral to a democratic society (Lipsky & Gartner, 1999). Inclusion is a process rather than a

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<sup>21</sup> Bailey & du Plessis (1997) and Thomas et al. (1998) argue that inclusion is grown out of the civil rights and normalisation movement in the 1960s, the mainstreaming movement in the 1970s and the integration movement in the 1980s. It is by the late 1980s that inclusion has come to supersede the concept of integration.

placement (Barton, 1998; Booth & Ainscow, 2004). It involves the process of ‘increasing participation of pupils within the cultures and curricula of mainstream schools’ and the process of ‘decreasing exclusionary pressures’ (Booth, 1996, p. 34). It is the dynamic nature of inclusion that it is often being expanded as a concept to indicate the extent to which a school or community welcomes pupils as full members of the group and values them for the contribution they make. Inclusion is not assimilation or accommodation of discriminated groups or individuals; it is also not about making people as normal as possible and about the well-being of a particular oppressed/excluded group (Barton, 1999, p. 58). Hence, continuously assuming assimilation and accommodation for students with disabilities does not help move a school or society towards inclusion. Inclusion is not integration because the latter is a concept of preparation for placing pupils with SEN in ordinary schools; this placement often fails to take quality of education into account (Barton, 1999). Some researchers therefore comment that integration is still associated with practices of ‘social control in education’ (Fulcher, 1989, p. 53). Inclusion is also not reducible to mainstreaming because this notion ‘selectively integrates exceptional students into such classrooms on a case-by-case basis, depending on the needs of each student and the demands of the regular education classes’ (Murphy, 1996, p. 472). The essence of selection, a notion built upon capitalist ideology, is opposed to the value and philosophy of inclusive education for all.

### *Operational definition*

After addressing the conceptual definition of inclusion, let us pragmatically consider its operational dimensions in terms of its implementation and practice. There may be a universal and powerful definition on inclusion offered in the Salamanca Statement (UNESCO, 1994) but inclusion can still be defined diversely by different vested interest groups based on different contexts to do different or maybe opposite things. This is why its multiple-interpreted nature has been highlighted by some researchers to be a threat to inclusion itself (Feiler & Gibson, 1999). This claim not only reveals their concerns regarding the conceptual level of inclusion but also their concerns regarding its operational level. Again, how to apply its conceptual definition in the everyday world of policy and educational practice is a serious concern, particularly in today’s capitalist society. In a broader sense and in its extreme form, inclusion represents ‘a revolutionary departure from existing organisational structures and systems of service delivery in education’ (Murphy, 1996, p.469). This reform is consistent with efforts to merge the dual general and special education systems into a more unitary and inclusive system (Stainback & Stainback, 1984; Fuchs & Fuchs, 1994). These notions

involve the dimensions of legislation, policymaking and legal and monetary considerations as well as its practice in the real educational arena. In the school-wide sense, the implementation of inclusion involves a comprehensive radical reform of schooling in terms of its 'curriculum, assessment, pedagogy and grouping of pupils' (Mittler, 2000, p. 10).

However, this advocacy comes up with practical dilemmas with regard to its implementation. Firstly, the discourse that inclusion is a one-size-fits-for-all formula persists. It has been repeatedly argued that some students' education is best provided outside classrooms or non-inclusive settings (Hegarty, 2001). Therefore, some researchers call for further distinction of the concept of inclusion; otherwise, it may be very difficult to implement inclusion in a complex school context (e.g. partial/full inclusion (Kauffman & Hallahan, 1995) and hard/soft/stupid inclusivism (Low, 1997)). Secondly, within the discourse of inclusion as human rights, people may question whose rights are being referred to (the parents, the child or others) and the free right to choose is another concern (Farrell, 2000; Riddell, 2002). There are also issues with regard to parental choice. Many parents of disabled students prefer to choose special schools because they are aware of the lack, or inadequate allocation, of resources in mainstreaming schools. If the closure of special schools occurred along with the advocacy of inclusion, parents would have fewer or no options to choose appropriate schools for their children. In this sense, there is a dilemma between choice of educational provision and full inclusion. Thirdly, the adequacy of the mainstream curriculum is another serious concern with the agenda of inclusion. These are challenges in developing a national inclusive curriculum to satisfy every student's individual needs. Students with SEN do benefit from a high-quality individualised developmental curriculum but it may withdraw them from learning with the majority of other students. The tension between the national curriculum and the developmental curriculum continues to exist within the process of inclusion. Fourthly, financing and resourcing are key dilemmas regarding implementation of inclusion. From the management viewpoint, whether educational expenditure should be concentrated more on special settings or on mainstream settings is the bureaucrats' main concern. It has been claimed that special provisions seem to be more expensive than inclusive settings but the costly special provisions provide skills and knowledge for excluded students to be independent after leaving school. As far as inclusive practices are concerned, the cost of educating excluded students in mainstream settings may be less, and they have more opportunities to work with other students. However, what makes some parents of disabled children dubious about inclusion is their concern about a reduction in the amount of money spent on disabled children when inclusion is implemented. Finally, inclusion challenges the

goals and values of education. It has been argued that if a government pays too much attention to improve students' academic standards, this may deflect focus away from the broad goals of education (e.g. social skills) (Hornby, 2002). Other researchers, however, argue that a subject teacher should pay primary attention to promoting students' social awareness and secondary attention to improving students' literacy and numeracy. This is a serious concern because they may miss the core objectives of education and this may 'run the risk of producing young people who are ethically rounded but otherwise ill-educated and unequipped for adult life' (Hegarty, 2001, p. 246). However, this argument itself also implicitly runs the risk of stressing ability-based performance and assessment to produce labour which the capitalist society requires.

To summarise, the above-mentioned dilemmas are connected with the reallocation of material and human resources and this reallocation may have a strong impact on the vested interests of a large group of people, so therefore the nature of inclusion has become complicated and politicalised. If the reform is so comprehensive and so radical, this may cause hesitation in its comprehensive implementation. This may explain why some researchers continue suggesting that inclusion should be divided into sub-concepts rather than seeing the concept *per se* as a whole. Other researchers also argue that promotion of inclusion is necessary but not necessarily full inclusion in terms of practice (Wu et al., 2008; Low, 1997; Kauffman & Hallahan, 1995). For them, the concept of full inclusion is more like a snare, delusion or special education bandwagon. In line with Murphy's (1996) comment, however, the definition and understanding of inclusion should not be based on semantics or rhetoric. The rhetoric of partial inclusion, from the viewpoint of accountability and management, is easier and quicker to achieve. However, if the definition and discourse of inclusion is still at the rhetorical level, the education structure will remain intact and real reform is difficult to achieve.

### **Critique of Influence of Functionalism on Inclusion**

The involvement of more capitalistic mechanisms is expected to help offer more diverse and free choices in education and academic pressures on students are expected to be reduced. These mechanisms, however, cause more concerns about competition, selection, accountability, cost-and-profit calculation and efficiency. As far as the local or central government level is concerned, the promotion of a more inclusive and flexible schooling system continues to be advocated but managing the public sectors or bureaucracy by means

of capitalistic mechanisms such as ‘cost-effective, efficiency, performance, indicators, quality assurance, accountability, unit of resource’ are inevitable (Barton, 1998, p. 81). This dilemma, of course, can be found within the context of school. The headteacher and staff advocate or implement inclusive practice on the one hand; on the other hand, they also need to continue identifying students with disabilities and giftedness and reinforcing the special and gifted education services to meet the requirement of accountability from the local or central governments. It is because of the tensions inherent in promoting inclusion which contains a value of celebrating diversity, democracy, difference and full participation within the capitalist society which itself stresses efficiency, competition, selection, cost-and-profit and performance that implementing inclusion comprehensively becomes difficult and slow. So presumably, the discourse of partial inclusion will be favoured by policymakers and practitioners influenced by managerialism because implementing partial inclusion may be simpler, more efficient and more accountable than full inclusion when translated into practice. Furthermore, the comprehensive implementation of inclusion may give rise to a number of dilemmas which have been described in the previous section. These concerns may offer the best rationale for managerialistic policymakers in continuing investing in special schools and units. On the whole, as far as the level of discourse is concerned, no matter whether it is called partial or full inclusion, they are all under the big umbrella term of inclusion. However, in order to avoid the mire of rhetoric, inclusion in this research means full inclusion, defined as having all students within the same physical location and, as far as possible, in the same class.

## **THE TAIWANESE SPECIAL AND INCLUSIVE EDUCATION CONTEXT**

Because theoretical and sociological accounts of the stratified special and gifted systems are also seriously scarce so far in Taiwan, Riddell’s (2007) sociological framework of special education and critique of functionalism in special education discussed previously are applied to examine the special education policy and practice in more detail. Although it has been indicated by Bottomore (1984) that historical and economic analysis is not the main focus of critical theory, in order to gain a more complete picture of the Taiwanese special and gifted education development, offering a brief historical account is necessary.

## Historical and Sociological Accounts of Special Education in Taiwan

### *Historical account*

It has been indicated that special education in the UK reflects the influence of humanitarian forces, social investment, social control and vested interests (Oliver, 1988). These interests include ‘the economic and commercial interests of a developing industrial society, which required as many people as possible to be productive, and political ruling-class interests in maintaining order and control in society’ (Tomlinson, 1982, p. 29). Another powerful legitimating mechanism to segregate students with SEN is the credential and ability-based examination system (Tomlinson, 1982; Barton, 1986). These early British special education developments not only highlight the importance of the influence of capitalism on special education, but also shed a light on explaining Taiwanese special and gifted education development. Taiwan was a single-party regime in the 1980s and its educational legislation, policies and practice as well as other aspects of society were centralised and controlled by the state apparatus (Wu, 1998). In order to control and manage its human capital development more efficiently and effectively, stratifying the education structure and maintaining competitive exam systems were the most efficient and rational ways to achieve this goal. Meanwhile, the 1980s was a decade of economic boom requiring more competitive high-quality human capital. To withstand international competition within a difficult political situation, Taiwan had to make best use of its human resource. Thus, it was in this era that the idea of establishing a gifted education system was considered. Since the entire society’s economic and living standard was improved due to the benefits of capitalism, the idea of establishing a special education system was also considered (Wang, 1981). It was claimed that disabled students benefited from segregated education, along with the discourse of equal education rights; hence, the special education system was established. However, those with power often ‘function within a climate of instrumental rationality’ and ‘seek rational, technical means of action without questioning the ends’ (Tomlinson, 1988, p. 46). From a neo-Marxist perspective, the establishment of an easily managed stratified schooling system was merely establishing a system reproducing the economic structure and producing stratified workers to fit into the socio-economic structure (Bowles & Gintis, 1977). Once the decision to establish this system was made, the government had to continue managing, rationalising and maintaining this stratification so bureaucratic administration was deployed comprehensively. As a result, three types of students (gifted/general/disabled) continued to be produced and reproduced within this structure and were then channelled into the society.

The argument made by Tomlinson (1982) that the social origin of the British state special education ‘can certainly be traced to the desire of educators in normal schools to separate out the defective and the troublesome, and thus special education can be regarded as a safety-valve, allowing the smoother development of the normal education system’ is an appropriate description of the Taiwanese education system (p. 45). However, it is worth considering why the Taiwanese stratified education system remained stable despite tension between the three different parts. Similar to many countries, it might be because the capitalist meritocratic ideology was generally accepted at all levels of society at that time. Acceptance of meritocracy was reflected in the Taiwanese society which places emphasis on exams, competitions and credentialism and in people’s submission to the government’s authority. This rationalised stratified system also involved the use of professional knowledge, so the US special education model was imported. Although the education system has been decentralised and deregulated after the education reform in the 1990s, control of the stratified education structure persists and linkage between the special, gifted and mainstream education systems remains weak.

### *Education for disabled students*

Law and policy are two powerful tools to legitimate the state apparatus’s authority. Applying Riddell’s framework to scrutinise the Taiwanese context, it can be found that the social constructionist approach is not taken into consideration in special education legislation and policymaking. Rather, the functionalist paradigm is a collectivistic epistemological underpinning for policymaking. The domination and legitimation of the functionalist paradigm, however, cannot be complete without the support of rationalised psychological and medical knowledge. Within the Taiwanese system, disabled individuals are tested by psychological or high-tech medical measures. This helps reduce and simplify individuals into numbers and personal innate deficits which can be controlled as medical cases and doing so can help the entire system to be managed efficiently and effectively. Therefore, it has been indicated that task simplification and specialisation, problem medicalisation and client differentiation are always favoured by bureaucrats under the very real consideration of the limited resources of the agency or state (Lipsky, 1980). This can explain why key features of the Taiwanese special education system such as psycho-medic assessment and managerialism as described in Chapter Two continue to be stressed. This managerialist approach is not only supported by the Taiwanese government in particular but also being supported by research (TMOE, 1995; Wu, 2007; Wu et al., 2008). This functionalist-based



system is believed to be beneficial to students and society so special education development may be continuously consolidated. It is also this functionalist paradigm that increases the application of efficient capitalist principles such as managerialism. Using the labelling process of disabled students described in Chapter Two as an example, it has been argued that efficiency is the root of this process and schools serve as the social control and economic and cultural reproduction agent. As noted by Apple (1990), such processes are based on operation and the elimination of waste, inefficiency and uncertainty. Very often, ‘these labels once conferred are lasting due to the budgetary and bureaucratic reality of many schools’ (Apple, 1990, p. 135). As a result, these individuals are efficiently simplified as labels and cases and further objectified under the consideration of managerialism. Segregated special education for these labels or cases is efficiently and effectively offered and ‘special education has become a convenient mechanism for legitimating the discrimination management of other “social problems”’ (Armstrong, 2003, p. 121). The Taiwanese stratified education structure is established on the assumption that gifted and disabled students are merely two different subgroups within the SEN group so education for the two groups are merely two symmetrical sides of the education system (also see Chapter Two). Following this assumption, the Riddell’s (2007) sociological framework can also be applied to analysing education policy and practice for the gifted children.

### *Education for gifted students*

As already mentioned, Western knowledge on special and gifted education has been imported into Taiwan. Interestingly however, it is very difficult to find the application of social construction theory to understand gifted students as proposed by many Western researchers<sup>22</sup> in the Taiwanese context. Similar to the concept of disability, the essentialist approach to understanding giftedness prevails in Taiwan and giftedness is understood as part of the nature of an individual. The gifted are further regarded as national assets and they are expected to become social elites for leading society (TMOE, 2008a; Wu, 1996, 1997, 2006 & 2009). This notion fits with the national resource model of giftedness proposed by Borland (1997). Accompanied by the discourse of meeting the needs of the gifted individual and fostering elites for the nation (Wu, 1996, 1997, 2006 & 2009; TMOE, 2008a), it is believed that gifted students should be efficiently identified and invested in with the help of professionals. Otherwise, this gifted human capital potential might have been wasted. Gifted programmes should be offered to conduct ‘educational triage – a form of damage control –

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<sup>22</sup> Such as Borland, (1997; 2003a & 2003b), Sapon-Shevin (1987, 1993 & 1996), Gallagher (2004) and Margolin (1993)

saving those children for whom mediocre education would not be tolerated by their parents' (Sapon-Shevin, 1993, p. 34). This kind of voice of demanding for establishment of gifted education may be from its customers' demands for more educational choices. Although a large-scale questionnaire survey<sup>23</sup> (1500 questionnaires distributed in 77% return rate) has been undertaken to explore views on gifted education policy of the participants (including scholars, educational administrators, gifted and general class teachers and parents) and their opinions on the relationship between gifted, general and special education (Wu, 1996), the research findings are not surprising. First, education reform is supported by most countries and it is always at top priority on educational agendas so the participants' support for education reform is not surprising. Second, this research does not explore participants' views on whether gifted education makes contribution to education reform or not. Third, none of the participants are gifted students themselves, parents with disabled children, special class teachers and headteachers. That is, the finding of supporting gifted education in this research is a more populist perspective from a vested interest group of people, particularly parents of gifted children, without taking any disadvantaged group's voices into consideration. Fourth, this research does not investigate participants' views on the correlations between gifted and general education and gifted and special education systems. Ultimately, management and administration in gifted education is reinforced and regulations regarding gifted education are included in the Act of Special Education to protect them. Via discourses of equal educational rights and meeting gifted students' needs, education for these future elites should be differentiated, protected, privileged and legitimised. Although Sapon-Shevin (1993) has indicated that gifted education is a protection of privilege, this claim seems not to be accepted in the Taiwanese context. For instance, Wu (1997), according to the Taiwanese educational context, has argued that the view that gifted education system monopolises too much resource within the wider special education system is a misconception.

However, let us consider the problems of gifted education in Taiwan. Firstly, every selection of one is a rejection of many. If only selected gifted students are seen as taken-for-granted members of future elites within the meritocratic system in the Taiwanese capitalist society, this seems to imply that the non-gifted students are not part of future elites. Secondly, researchers have claimed that gifted students have difficulties adjusting to rigid systems and group teaching so they deserve differentiated or segregated education separate from

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<sup>23</sup> This research shows that: (a) 82% of the participants support steady educational reform; (b) 88% the participants support the co-existence of special and gifted education systems and the two systems should operate simultaneously; (c) The ignorance of gifted education in education reform agenda and holding a completely segregated national conference on special education are evident.

mainstream education (Phillipson, et al., 2009). However, a better solution might be to reform the rigid systems which exist rather than offering segregated learning environments. Apparently, 'non-gifted' or 'normal' students are expected to function within the rigid mainstream educational system. This is running the risk of making students within this system think themselves inferior to a selected minority. It may be true that gifted education may challenge traditional pedagogy and make a contribution to educational reform. The evidence, however, is that most provision for gifted pupils is separate from the mainstream education system. Thirdly, the government invests in the human capital of 'gifted' pupils due to their talents which are regarded as things which can be objectified and capitalised. However, giftedness has no physical reality and the government seems implicitly to claim that the 'political investment of the body is bound up, in accordance with complex reciprocal relations, with its economic use...the body becomes a useful force only if it is both a productive body and a subjected body' (Foucault, 1991: 25-26). Whether this way of treating students as commodities is appropriate in education policymaking is problematic. If gifted students are truly the state's national assets, the ownership of their giftedness needs to be clarified. Commodities can circulate (Marx, 1998) so where these commodities are being circulated is unknown because the ownership of giftedness is the individual itself. Profits produced by gifted individuals may not necessarily belong to the state because they have the freedom to refuse exploitation by the state. Therefore, the government's investment may become a drain on the economy and be transformed into gifted individuals' profits. Chiang & Liao (2004) adopt a neo-Marxist perspective to explore fifteen Taiwanese gifted students' views on gifted education and it is found that the Taiwanese secondary gifted programme (for gifted students in maths and science particularly) is particularly dominated by capitalism. They also argue that the meritocratic selection system seems to be very mechanistic. Overall, criticism of the education system for gifted children in Taiwan persists, such as elitism, credentialism, inequality and entrance-exam preparation class (Wu, 1996, 1997, 2006 & 2009; Phillipson, et al., 2009) on the one hand. On the other, however, the establishment of gifted education is also standing on the grounds of equalitarian and altruistic principles (Wu, 1996, 1997, 2006 & 2009). From the functionalist's perspective, capitalist mechanisms should be employed in the special and gifted education systems in Taiwan to accommodate these individuals with superior or inferior innate abilities. However, irrationalities emerge from this functionalist-paradigm system. For example, the assessment systems are complex and expensive and the boundaries between different groups of standards are arbitrary. Many are based on IQ tests whose legitimacy has been questioned. Finally, the separate SEN system may act as a major brake on inclusion.

## Critique of Discourse of Inclusion, Inclusive Practice and Inclusive Research

### *Critique of discourse of inclusion and inclusive practices*

As noted in Chapter Two, the Taiwanese government simplifies normalisation, integration, mainstreaming and inclusion as synonyms in its policy document (TMOE, 1995, p. 31). This understanding not only differs from the connotation of inclusion discussed previously, it also indicates that values and beliefs regarding education are muddled together. No matter that the Taiwanese government attempted to establish a seamlessly equal tripartite or an unequal stratified education system in the 1980s; despite this, three facts cannot be denied. Firstly, the system continues to be separated and to date, there is still no official definition on inclusion offered by the government. Secondly, along with the dissemination of discourse of inclusion, the government intentionally does not include the special and gifted education agendas in the national education reform conference<sup>24</sup> and continues rationalising, legitimating and consolidating the stratified special and gifted education systems. This is not to claim that the contribution of this stratified system should be ignored; however, does this stratified education system contribute much to educational mobility and inclusivity and further, make society become more inclusive is open to question. And whether this ossified system can facilitate the notion of 'inclusive education as integral to a democratic society' (Lipsky & Gartner, 1999, p. 18) is questionable. It is true that more and more students with disabilities or giftedness are included in mainstream education, but inflexibility and stubbornness of the stratified education structure continue in perpetuating this stratification and the government does not have any intention to build alliances or bridges within the stratified systems. Continuingly influenced by capitalistic ideologies of free-market choice and competition, academic pressure within the mainstream education system does not reduce because the meritocratic selection system remains there and every student and their parents still try their best to be the winners in this system. No matter whether the student is disabled or gifted, as long as he/she has opportunities, he/she or his/her family will find ways to improve his/her academic attainment or enhance his/her other skills such as music, art, language and so on (e.g. the most convenient way is to attend after-school cram schools which I have described in Chapter Two). Influenced by Chinese culture, Chinese people believe that a person can gain this exceptional power or abilities by industriousness, perseverance and learning (Chan,

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<sup>24</sup> Hung (2001) indicates that 'in 1995, the Minister of Education thinks that the complexity of special education should not be merged into the discussion of mainstream education and he insists not including special education issues in the 7<sup>th</sup> national education conference' (p. 125). She further criticises that the Taiwanese government still regards students with SEN as a segregated group from mainstream education and this government seems to have no intention to promote inclusion.

2007) so children are continuously being conceptualised as lineage and economic capitals to be invested in; Taiwanese people are no exception. Students and their parents believe industrious studying will enhance intelligence and competitive ability and result in winners of tests or exams. Students who are not selected in the gifted classes such as normal and disabled students are encouraged to try their best to jump out of their current positions or hierarchy because there is another much better and privileged hierarchy called gifted hierarchy perpetually available there for them. However, it remains undeniable that students from affluent or advantaged families tend to have far more opportunities to enter the gifted hierarchy.

Discourse of inclusion appears in short sentences in the government policy in the 1990s (TMOE, 1995) and this discourse continues but two facts hinder the development of inclusion. First, a clear and official definition of inclusion does not appear anywhere. Second, conversations between gifted, general and education systems continue to be rejected by the government. Influenced by functionalist thinking, the entire structure is stratified into three systems. This decision may be attributed to the public bureaucracy's managerialistic discretion under the realistic consideration of limited resources as well as efficiency and control. Once the decision is made, however, it directly impacts upon every member within this structure, including headteachers, teachers and the students. This decision may rationally help the structure work smoothly and efficiently and bureaucracy can develop within its own system. Conversely, this decision may reinforce the gulf between classes because people are classified by ability based on the competitive and rational meritocratic and reductionist psychological test systems. Paradoxically and ironically, this weak-linkage stratified structure is constructed upon the discourse of equal educational rights, plus equality and justice. It is evident that the highly-stratified system needs a structural reform to meet students' more diverse needs, particularly after the decentralisation of governance and democratisation of this country. However, it seems that the reluctance to bridge these three inseparable systems remains.

At school level, the degree of integration or mainstreaming appears to be high on the façade. As a matter of fact, the majority of students with disabilities continue to be segregated in special education classes at mainstream schools. For instance, it can be an extremely rare case to see that students with giftedness and disabilities work and study together in a school which contains gifted and special classes. Mainstreaming has been implemented in Taiwan for decades but this notion contains a selective element, based on Murphy's (1996) criteria.

If inclusion is equal to mainstreaming, as the government policy claims, this means that inclusion also contains an element of selection in Taiwan. Some researchers suggest that a mainstream class which includes one or two students with SEN and offers them special education services can be called an 'inclusive class' despite the fact that the term inclusive class has never been used officially in government policy documents or legislation (Wu, 2007; Wu et al., 2008). In real education arenas, the quality of this service is low because the entire national curriculum is targeted towards students without disability and human resource is extremely limited. As discussed in Chapter Two, the Taiwanese education reform movement started from 1994 and a new national nine-year integrated curriculum was produced and implemented in school afterwards. Since the national special education conference is held separately, issues of special needs and inclusion then is missing from the national curriculum. Also, the phenomenon of sharing the service offered by only one teaching assistant to support students with SEN located at different classes at school is revealed. Students with SEN in regular classes basically are those who do not disturb class order or discipline such as students with blindness, deafness or mild physical disability. That is, they are selected, such as Murphy (1996) has argued. As far as education for the gifted students is concerned, an inclusive agenda is missing in the gifted education whitepaper. The policy document, in concurrent with researchers in gifted education suggests that the entire education pedagogy and quality can be improved because the way of teaching can stimulate and challenge the general education pedagogy and the entire system with the help of gifted education (TMOE, 2008; Wu, 2006). Interestingly however, gifted education is often addressed within the segregated gifted class. How can segregated gifted education pedagogy benefit and challenge the general education pedagogy and curriculum without taking the issue of inclusion of students with giftedness into consideration in policy? In a loosely-defined sense, inclusion of students with SEN at school level may be improved generally. However, it is a fact that students remain to be trichotomised and educated in the gifted classes, the general/regular classes and the disabled classes within schools. Therefore, in order to avoid the confusion of integration, mainstreaming and inclusion, the Taiwanese government's stance of viewing these three terms as synonymous is rejected.

### *Critique of inclusive research*

It has been argued that there is no agreement on the operational definition of inclusion and various practices may possibly be described as inclusive (Riddell, 2002). This notion is particularly true in the context of Taiwan. As mentioned in Chapter Two, a clear official

definition of inclusion is lacking in the government's legislative and policy documents. Inclusion is loosely defined as moving disabled students from segregated institutes and schools to mainstream educational settings and it is also reduced as a synonym of integration, mainstreaming and normalisation (TOME, 1995). Wu (2007), based on the Taiwanese context, argues that 'inclusion is different from integration or mainstreaming' and 'all students' should be included in the school community 'regardless of their strengths or weakness in any area' (p. 85). He further defines full inclusion as 'the integration of students with disabilities in the general education classrooms with students of the same ages who do not have disabilities' (p. 81). His definition is different from the definition of inclusion used in the Taiwanese governments' policy document. Apparently, gifted and talented students are clearly not taken into account for both of them. In his study, the term 'inclusive class' is used and number and percentage is given. Interestingly, the research itself states clearly that the term 'inclusive class' is neither used officially in Taiwan, nor in schools. This study, however, produces official number and percentage of these 'inclusive classes'. The term 'inclusive class' described in this research merely refers to the class which accommodate one or more students with disabilities without changing the entire curriculum, pedagogy or other related services in real educational arenas. Whether this can be called 'inclusive class' and the practice can be called inclusion is highly questionable. Moreover, this research does not address issue regarding the inclusion of gifted students at all. This phenomenon, in fact, is continuingly to be found in other research of inclusive education in Taiwan (e.g. Wu, 2007; Wu, 2009b; Hung, 2001).

Wu (2007) further cites S.M. Wu's (2005) classification of inclusive models to indicate that there are four models of inclusion<sup>25</sup> implemented in Taiwan (also see discussion on p.30 in Chapter 2). The first model is the community-based inclusion model. This model is implemented in two private schools only and unfortunately, one has closed down. The second model, the cooperative inclusion model, can only be achieved at the preschool level. The implementation of this model, on the one hand, may imply that the importance of inclusion is noticed and emphasised. On the other hand however, it may imply that there is a limitation to implementing inclusion beyond the preschool level. The third model is the reverse inclusive education model

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<sup>25</sup> According to Wu (2007), the four models are: the community-based model, the cooperative model, the reverse inclusion model and the affiliated inclusive programme. (a) The first model included one or two students with disabilities in two non-government private mainstream schools. These are two schools implementing this model but one has closed down. (b) The second model combines students with and without SEN in classes. Mainstream and special teachers are included as well. (c) The third model is extremely unique because students without SEN are recruited in special schools to receive education together. (4) The fourth model only exists in one university-affiliated experimental primary school.

which has been implemented in some national special schools. This model, however, continues to conflict with the global value and philosophy of inclusion. More paradoxically, as stated clearly by the government (TMOE, 1995), inclusion means supporting a child to move from a special institute to a mainstream setting; however, these state-owned national special schools continue recruiting students without disabilities and doing inclusion in a completely opposite direction. This practice is only managed in one or two specifically chosen classrooms to encompass inclusion and it is difficult to be implemented school-wide. Therefore, this model is criticised by Hung (2008) as another form of segregation but with the name of inclusion. Fourthly, the university-affiliated inclusive programme is the unique one (this model is analysed in detail in Chapter Seven). A luxurious and completely separate campus (named as inclusive campus) has been built to implement this model and a university professor co-leads this programme with the headteacher. In this model, students with and without SEN are mixed together in classes in this segregated campus away from the main campus. What makes this model more distinctive is that the mechanism of rigorous selection is applied for selecting students. Students must take tests and be *selected* and parents must be interviewed if their children want to join in this separate inclusive campus. In other words, those who do not perform well enough are excluded from the admission and these students tend to be more disadvantaged or profoundly disabled students. When applying Murphy's (1996) differentiation of mainstreaming and inclusion, as discussed previously, it can be easily found that this selective inclusive model is more like doing mainstreaming work within a separate campus by using the method of selection. Since the two campuses are segregated, whether this practice can be called inclusion is open to question. Inclusion refers to including all students in mainstream settings, as discussed; however, the capitalistic means of selection has been employed to select students to fit within this model. Hung (2008, p. 62), therefore, cites the work of Tsai (2000) and criticises that these programmes may 'abuse' the name of inclusion. It should also be noted that all these four models do not take gifted/talented students into consideration. Even though inclusion in Taiwan is in its 'developing' or 'experimental' stage (Hung, 2001, p. 126; Wu, 2007, p. 91), strictly speaking, these neither-fish-nor-fowl models are reflecting the government's unclear policy. Also, these models reveal the difficulties of its implementation.



# **CRITIQUES OF RESEARCH ON HEADTEACHERS' VIEWS ON INCLUSION**

## **The Significance**

Headteachers are at the middle rung of the complicated educational structure. They play the major roles in implementing change, innovation and policy (Avissar et al. 2003; Bailey & du Plessis, 1997). They not only need to receive governmental policies from the upper level of the educational hierarchy but also need to translate them into practice to those who are at the lower level of the hierarchy such as teachers and administrators. It has been suggested that a headteacher's personal educational ideology around SEN provision can be a particularly powerful influence on 'decision-making about the resourcing and positioning of the SEN department' (Bowe et al., 1992, p. 135). They also have to be responsible for 'negotiating with outside agencies, allocating resources internally and shaping staff attitudes' (Hegarty et al., 1981, p. 83-84). In fact, these outside agencies may not only include the public sectors; they may also include: the funding bodies of the school, parents and their groups and other powerful groups. Owing to the political and managerialistic nature and significance of their roles in school and in society, understanding their views can help us grasp a more comprehensive picture of inclusion rather than simply focusing on the upper or the lower levels of the educational hierarchical structure. However, educational research often pays too much attention to those with less power (Walford, 1994) so it is a necessity to 'research up' the powerful people. To date, there is little empirical research and literature on headteachers' views and attitudes towards inclusion (Avissar et al., 2003). These notions all strongly indicate one thing: headteachers always play the most pivotal roles in promoting special and inclusive education in a school and researching their views on inclusion cannot and should not be ignored if we wish to implement inclusive practice for students with SEN in school.

## **Empirical Studies**

Up to now, the majority of studies regarding headteachers' views on inclusion are situated in the positivist paradigm and attitudinal survey is often used to explore their attitudes towards inclusion. Relevant literature shows that there is no consensus for headteachers' attitudes towards inclusion at school. Two Australian large-scaled empirical studies, for example, show that headteachers present positive attitudes towards inclusive practices at school (Center et al., 1985; Bailey & du Plessis, 1997). One American study, however, shows that

the majority of headteachers (more than 70% of 408 headteachers) hold uncertain attitudes towards inclusion and only 21.1% of them hold positive attitudes in Pennsylvania (Praisner, 2003). Compared with the Australian and American research, studies on headteachers' attitudes towards inclusion in Israel are small-scale (Avissar et al., 2003; Timor & Burton, 2006). The qualitative study conducted by Timor & Burton (2006) suggests that attitudes of four headteachers towards inclusion are less supportive than that of counsellors and teachers in five secondary schools. Although Israeli primary school headteachers are supportive of inclusion, their support depends on the severity of students' disability (Avissar et al., 2003). Besides these differences, background variables such as years of working experience and educational qualifications have effects on headteachers' attitudes towards inclusion (Center et al., 1985; Avissar et al., 2003). Interestingly, one study indicates that there is no relationship between headteachers' attitudes towards inclusion and years of their experiences in administration or in special education teaching (Barnet & Monda-Amaya, 1998). Besides the influences mentioned above, another factor may influence headteachers' attitudes towards inclusion as well; that is gender of HT. The majority of Australian headteachers (73.2% of 2000 headteachers) in a small-scale survey study support the idea of inclusion but one-third of them are female headteachers (Bailey & du Plessis, 1997). Although it is found that age is a factor influencing headteachers' attitudes towards inclusion (the older the headteachers are, the fewer full-inclusion practices they implement) in Israel (Avissar et al., 2003); however, 95% of participants in this survey study are female as well. Results of the two studies cannot be generalised and the issue of gender balance of participants may be taken into consideration for future studies. In contrast to the quantitative studies mentioned above, some researchers use qualitative interviewing to explore LEA officers and headteachers' views on inclusion in the UK (Croll & Moses, 2000). This research shows that: first, the majority of them do support the ideal of inclusion but this support tends to remain at a rhetorical level. Second, types and severity of SEN students and appropriate resourcing are two important issues regarding its implementation. Third, some interviews lack coherence and internal contradictions are found (e.g. two special school headteachers self-contradict on the issue of closing special school in their interviews). Another piece of research may not focus on investigating headteachers' views on inclusion, but offers insights on how headteachers view students with SEN within the school context under the influence of capitalistic ideologies such as market and choice on education (Gewirtz et al., 1995). This research suggests that in order to ensure their schools are responsive to customers such as parents, some headteachers may develop marketing 'competitive edge' over other schools (p. 91). For example, some schools are more likely to welcome children with high abilities than

those ‘undesirable’ students with SEN because the former can ‘enhance a schools’ league table performance with minimal investment’ but the latter may be seen as a ‘liability’ of school (p. 139). This research not only clearly shows that factors of market and customer may have influence on the implementation of inclusion and how students are perceived, but also complicates the issue regarding headteachers’ views on inclusion.

Overall, these studies show three facts. First, current studies on headteachers’ views mainly situate in the positivist paradigm and focus on testing the relation between participants’ background variables and attitudes towards inclusion (more details of these studies are tabulated in Table 3.1). Influence of other social factors is not fully elaborated. The previous section has shown that many researchers have highlighted the complexity of a headteacher’s role and he is influenced by various social powers and factors. Lipsky (1980) further argues that public sector managers, situated in a conflictual and reciprocal position within the structure, they may develop various coping mechanism used by street-level bureaucrats to accomplish this task in order to achieve ‘compliance with agency objectives’, maintain their vested positions and interests and meet clients’ needs (p. 25). Applying his notion to the school context, the manager can be referred to the headteacher and teachers can be seen as the street-level bureaucrats. In other words, headteachers as school managers situate in a conflictual and reciprocal position within the education structure and they have to compliance with objectives assigned by local or central governments. Meanwhile, they also have to maintain their own vested positions and interests and meet students’ and parents’ needs. Obviously, headteachers’ decisions or their views are influenced by various different social powers. Without taking the broad social context into consideration, whether these quantitatively-based studies can offer substantial benefits for headteachers to implement inclusion in real and complex educational arenas is problematic. Although Bailey & du Plessis (1997) try to analyse headteachers’ attitudes towards inclusion at both philosophical and practical levels, they do not examine sufficiently the influence of other social factors. This implies that the void of the influence of social factors on headteachers’ views and attitudes towards inclusion needs to be filled in order to grasp a broader picture regarding the issue of implementing inclusion. Furthermore, the lack of more research on headteachers’ views on inclusion in other areas such as Asia, Africa and Europe is evident. Without sufficient literature from different countries, it will be difficult to make an international comparison and gain more insights into headteachers’ views on the issue of implementing inclusion. Let us return to the context of Taiwan. To date, studies pertaining to headteachers’ views on the inclusion of students with SEN are lacking in Taiwan. Also, the education

structure remains stratified and the government has no intention of implementing inclusion. Based on these facts, researching the Taiwanese headteachers' views on inclusion is crucial and urgent.

Table 3.1 Empirical studies on headteachers' attitudes towards inclusion

Studies	Country	Methods	Headteachers (HTs)	Schools	Findings
Center et al. (1985)	Australia	Questionnaire survey	Sample: 1503 Population: 2725	1. Government (High, primary, special schools)  2. Non-government (Catholic, independent)	<ul style="list-style-type: none"> <li>More than 80% of headteachers displayed positive attitudes towards the concept of integration.</li> <li>Background variables such as number of years of service as a headteacher, education qualifications and administrative or teaching experiences with a special class had influence on headteachers' attitudes towards inclusion</li> </ul>
Bailey & du Plessis (1997)	Australia	Semi-structured interviews	3 male headteachers	Primary, secondary	<ul style="list-style-type: none"> <li>In the questionnaire survey, 73.2% of 200 headteachers supported inclusion. Workload and stress of teachers were important issues in inclusion.</li> </ul>
		Questionnaire survey	Sample: 200 (one-third were females)	Preschool, primary, special, high	
Barnet & Monda-Amaya (1998)	US	Questionnaire survey	Sample: 115 (30% were females) Population: 3879	Elementary, junior high, senior high	<ul style="list-style-type: none"> <li>There is no consensus about the definition of inclusion.</li> <li>There is no relationship between positive/negative attitudes toward inclusion and the number of years in administration or special education teaching experience.</li> </ul>
Croll & Moses (2000)	UK	Interviews	17 LEA officers, 9 special school heads, 12 mainstream primary school heads	Primary and special schools	<ul style="list-style-type: none"> <li>The majority of interviewees support the ideal of inclusion but it remains at a rhetorical level.</li> <li>Appropriate resourcing and types and severity of special needs are pragmatic issues regarding inclusion.</li> <li>Internal contradictions and lack of coherence regarding inclusion are found in some interviews.</li> </ul>
Avissar et al. (2003)	Israel	Questionnaire survey	Sample: 110 (95% were females) Population: 205	Elementary	<ul style="list-style-type: none"> <li>Headteachers' level of education had influence on their perception of the severity of the problem.</li> <li>Older headteachers implemented fewer full-inclusion practices.</li> <li>Headteachers are supportive of inclusive practices but their support depends on the severity of students' disability.</li> </ul>
Praisner (2003)	US	Questionnaire survey	Sample: 408	Elementary	<ul style="list-style-type: none"> <li>21.1% of 408 headteachers are positive about inclusion while 76.6% of them hold uncertain attitudes.</li> <li>The more the in-service training hours taken the more positive the attitude toward inclusion.</li> <li>The more positive the experiences with students with disabilities the more likely the headteacher is to choose less restrictive settings.</li> </ul>
Bailey (2004)	Australia	Questionnaire survey	Sample: 644 Population: 1367	Preschool, primary, special, high	<ul style="list-style-type: none"> <li>A validated scale titled Principals' Attitudes towards Inclusive Education (PATIE) was developed.</li> <li>Teacher workload, inclusion benefits, learning challenges, excluded students and professional training are five major factors of the scale</li> </ul>
Timor & Burton (2006)	Israel	Questionnaire Survey	5 headteachers; 76 teachers; 16 counsellors	Secondary	<ul style="list-style-type: none"> <li>'Headteachers' attitudes towards inclusion were less supportive than that of counsellors and teachers' (p505).</li> </ul>
		Interviews	5 headteachers; 12 teachers; 11 counsellors	Secondary	

## SUMMARY

This chapter not only attempts to formulate a theoretical context for this research, but also to explore the political context of special and inclusive education development in Taiwan by utilising Western literature. Clearly, inclusion has a more embracing and universal meaning than normalisation, integration and mainstreaming and its implementation is linked with radical education reform. The implementation of inclusion not only involves radical school and structural reforms but also challenges the dominant functionalist thinking, the managerialist approach particularly, prevailing within the field of special education. Accompanied by some researchers' claim for the 'expansion of special education' in terms of its 'quantity' and quality to promote inclusion (Wu, 2007), the Taiwanese government's hesitation in the implementation of inclusion therefore continues. With the influence of capitalism, capitalistic mechanisms are continually being deployed to rationalise, legitimate and reinforce the stratified structure and dominate and control students SEN. The unclear policy of inclusion within this rigid managerialist-based stratified education structure driven by capitalistic ideology not only affects how practitioners (e.g. headteachers) understand students with SEN and their inclusion but also affects how these practitioners implement inclusion. Although little research has been done on headteachers' views on inclusion up to now, qualitative research on headteachers' views on inclusion offer much insight to help understand the influence of social factors on their views. Some quantitative research has indicated, however, that their views on inclusion may be influenced by their personal factors as well. It is this context that researching headteachers' views on inclusion is urgent, to learn more about the social factors from these school managers' views. Understanding their views may make contributions to the implementation of inclusion, particularly within the Taiwanese context as it is highly influenced by capitalism.

## **CHAPTER FOUR**

### **METHODOLOGY**

#### **INTRODUCTION**

This chapter, in four sections, is concerned with methodological consideration of this research. In the first section, research questions, purposes and my ontological and epistemological positions are addressed before moving onto discussing the methods used for acquiring and analysing knowledge. Headteachers are educational elites in Taiwan and their views tend to be more difficult to penetrate than other groups. Unsatisfied with the knowledge regarding their views on inclusion offered by positivistic research and the long-term dominance of positivistic paradigm on the Taiwanese special education field, I determine to use a qualitative approach, combined with two case studies, to gain insight of headteachers' views on inclusion. In the second section, methods of selecting the interview participants and of selecting two schools to do the case studies are presented. The third section discusses how the collected data is being analysed. Owing to headteachers' high social status in Taiwan, ethical concerns should be taken into serious consideration and this is discussed in the fourth section.

#### **RESEARCH QUESTIONS, PURPOSES AND ONTOLOGICAL AND EPISTEMOLOGICAL STANCES**

##### **Research Questions**

It has been argued that social scientists do not pay much attention to study up (Ostrander, 1995) and educational research is no exception. Walford (1994), for instance, points out that educational research tends to pay more attention to researching down those with less power rather than researching up those with more power. To date, there have been few investigations into the views of powerful people on inclusion internationally, such as school headteachers. As noted in Chapter One, Taiwanese society is influenced by Confucianism so people tend to defer to authority and to powerful people. Based on this background, research on views of educational elites or policy makers on inclusion has been severely lacking in Taiwan. However, the entire society is changing and this research attempts to fill this research void and educational elites are selected as the targeted participants for this research.

According to Wang (2004), policy makers, central and local governmental educational bureaucrats and school headteachers can be regarded as educational elites owing to their high social status and powerful political influence on education in Taiwan. Policy makers, central and local governmental educational bureaucrats are not targeted participants for this research, for two reasons. First, it has been argued that understanding public policy from those who implement it in daily work is a better way to understand the policy itself (Lipsky, 1980). Therefore, utilising headteachers' views to present and examine the inclusive policy and the macro structural problems is more appropriate than examining government officials' discourses. Second, accessing policy makers, central and local governmental educational bureaucrats in Taiwan is comparatively more difficult than investigating headteachers when taking the practical difficulties such as time and social status into consideration.

It has been indicated that professional views and attitudes on special education may act to facilitate or constrain its implementation of policies which may be considered radical or controversial (Ward, Center & Bochner, 1994). When considering the issue of implementing inclusion at school, this notion is particularly significant because attitudes are often influenced by social factors and people's views on the social world. Taking school headteachers as examples, their understanding about students with SEN influences their views and attitudes towards inclusion and how they implement the practice. Based on this assumption, two central research questions are addressed. **(1) Firstly, what are headteachers' views on inclusion of students with SEN in mainstream classes?** Under this question, two further sub-questions are taken into consideration. As far as students with SEN are concerned, do headteachers also hold different views on their inclusion because they are dichotomised into two polarised groups? As far as headteachers themselves are concerned, do different headteachers show different views on inclusion in terms of the nature of their schools and their personal identities? However, critical social research is never satisfied with the ostensive level of knowledge. It pays more attention to the fundamental nature of phenomena and tries to dig beneath the surface of appearances (Harvey, 1990). Decision- and policy- making of private school headteachers tend to be influenced by their customers (e.g. parents). Comparatively, the influential factors on public headteachers' decision- and policy-making are more complicated. Besides receiving policies and regulations from the governments and implementing them, public school headteachers also have to deal with parents' demands. It is obvious that headteachers are key actors in collecting and distributing opinions within the educational structures. Understanding their views on inclusion may also help reflect and uncover parents' and bureaucrats' views on

inclusion, shedding light on the issue of inclusion from a broader Taiwanese social and educational perspective. **(2) In this regard, another broader central question is taken into consideration: why do headteachers hold these views on inclusion and what social factors contributed to their views in this capitalist Confucian society?** Under this question, two sub-questions are asked. What are the barriers to implementing inclusion in terms of these school managers' views? What roles do headteachers play under the dichotomised education systems covered by rhetoric of inclusion? These questions serve as the function to help this research 'do constant shuttling back and forth between concepts and data, structure and part, past and present and theory and practice' (Harvey, 1990, p. 201).

### **Purposes and Ontological and Epistemological Stances**

It has been argued by Maxwell (1996) that the formulation of research questions often takes the research purposes and tentative theories into account. He therefore suggests that a researcher should carefully consider the personal, practical and research purposes in his/her research. His contention is important for researchers in two aspects. On the one hand, addressing the purposes of the research clearly is essential because this is a 'controlling force' in research (Patton, 1987, p. 150). On the other, the purpose of research helps justifying the entire research including the design, measurement, analysis and reporting of the research process (Maxwell, 1996; Patton, 1987). What follows are the personal, practical and research purposes of undertaking this research. These purposes explain how the two central research questions discussed in the previous section are formulated.

Firstly, the personal purpose is concerned with the motivation for doing the research. I have been studying and working in the field of special education for a long time. As far as special and inclusive education and research in academia and the practice in real education arenas are concerned, it is highly dominated by psychology and rehabilitation professions in Taiwan's context. It is this background that challenging my previous taken-for-granted knowledge regarding special education becomes one of my personal motivations to undertake this research. Another motivation of doing this research is from my curiosity of whether headteachers show different or coherent views on inclusion under the highly dichotomised education structure in Taiwan. Secondly, the practical purpose focuses on accomplishing something significant in a research project. Perceiving the scarcity of sociological perspectives on special education and inclusion, the practical purpose of this study is twofold. First, this research attempts to challenge educational bureaucrats' singular



perspective of understanding students with SEN and their inclusion by means of investigating and understanding their representatives' (the headteachers) views on students with SEN and inclusion. It also tries to offer more diverse perspectives to enable educational bureaucrats and practitioners to understand students with SEN and inclusion. Second, this research attempts to offer a sociological model, presenting how school headteachers' views on inclusion are shaped and affected by social factors. The result of this research is expected to stimulate these headteachers to have a new perspective on students with SEN and inclusion, and to some extent, it is expected to change their views on the inclusion of students with SEN. In this case, the study can be regarded as applied educational research as well. Thirdly, the research purpose is more academically-oriented and it focuses on 'understanding something, gaining some insights into what is going on and why this is happening' (Maxwell, 1996, p. 16). This study is regarded as basic research and the purpose of basic research is making a contribution to knowledge 'for the sake of knowledge' (Patton, 1987, p. 152). Based on this notion, making a theoretical contribution to knowledge regarding special education and inclusion is the research purpose of this thesis. In this regard, being a basic social science researcher, understanding and explaining a phenomenon is my second research purpose.

These purposes and the formulation of research questions are also influenced by my ontological and epistemological stances of knowledge. As mentioned in Chapter Three, the Taiwanese special education field has been dominated by the psychological reductionalist paradigm for decades and concepts of disability and giftedness continue to be regarded as objective notions. Influenced by this ontological and epistemological stance, inclusive practice continues to be implemented at a rhetorical level. It is a fact, however, that powerful people affect and construct knowledge regarding students with SEN and inclusion in the social world. That is, realities regarding students with SEN and inclusion cannot and should not merely be assumed and understood as objects and universal truth which can be taken for granted and to be discovered 'out-there'. It has been indicated by Mason (2005) that holding alternative ontological stances can help tell different stories about the social world. Based on this notion, rejecting the realist's objective position influenced by the psychological reductionalist paradigm to understand reality and knowledge regarding special education and inclusion is essential. Furthermore, the main focus of this research is to address and analyse the extensive educational structure and its ideological manifestations and processes with the aim of understanding headteachers' views on inclusion. Therefore, taking the nominalist subjective position is more appropriate than the realist's position for exploring reality in

depth and making a contribution to knowledge. In addition, knowledge can be understood more clearly through continuous critiques (Harvey, 1990). Influenced by my previous learning and teaching experiences within the Taiwanese education structure, this research not only attempts to reveal views on inclusion of headteachers who serve within the ostensibly rationalised education structure but also tries to unearth the external ideological influence out of the structure. Taking the positivist stance to understand special and inclusive education development then is not enough. Rather, adopting the subjectivist approach to research headteachers' views on inclusion becomes imperative. It is also important to clarify here the working definition of inclusion adopted in this research. As discussed in Chapter Two, the Taiwanese government's stance on inclusion is unclear. To avoid rhetorical discussion, the definition adopted is including all students in mainstream classes.

## **METHODS**

### **Selection of Interview Participants**

#### *Selection criteria*

Before moving on to discuss how data was collected, it is important to explain in more detail why headteachers are the main participants of this research. Firstly, it is apparent that the headteacher, who serves as a leader at school, plays the major role in implementing change, innovation and policy. Also, power resides within headteachers and principals (Walford, 1994). Since inclusion is related with school changes and reform, examining these powerful people's views on inclusion is a necessity. Secondly, headteachers are uniquely informative as they are experienced experts in the educational arena. What should be noted is that a headteacher sometimes may play more roles within Taiwan's educational and social context. For instance, some headteachers may take part-time positions in universities and others may be professional consultants at central or local governmental sectors in Taiwan. Views from these educational elites on inclusion should not and cannot be neglected. Thirdly, all Taiwanese headteachers may have years of teaching and administrative experience. Their views on inclusion may be closer to the real educational arena than the views of office-based bureaucrats and policy makers. Fourthly, it has been identified that there are barriers to implementing inclusion in Taiwan but these barriers are expressed out of teachers' concerns (Chang, 2006) but not from school managers. Since headteachers are the key actors at administrative and managerial level, exploring their views is crucial because their opinions

can help identify barriers to inclusion at a macro and realistic level and help shape the full picture regarding inclusive education within the whole school context. The elite characteristic of headteachers makes it more difficult to undertake this research when compared with other 'researching-down' studies. In order to gain more insights on headteachers' views on inclusion, the qualitative approach is used. The qualitative data will be collected to shape the full picture of the jigsaw of headteachers' views on inclusion. It is noteworthy that not including policy makers and governmental educational bureaucrats in this research does not mean that 'researching up' educational policy makers and bureaucrats is unnecessary. It is because the main focus of this research is on the headteacher's views on inclusion. In order not to lose focus, policy makers and bureaucrats are not included in the sample of interviewees.

In order to enhance the heterogeneity to achieve a high level of representativeness of participants and also establish particular comparisons (Maxwell, 1996, p. 71-72), these participants are purposively selected based the combination of two criteria. Firstly, they are selected based on the nature of the schools. Based on the criteria of type of school, these schools are mixed with mainstream/special schools, complete (junior high and senior high level)/comprehensive (senior high and senior vocational) schools, public/private schools and university-affiliated schools. Based on the criteria of level of school, five types of schools (primary, junior high, senior high, senior high and special schools) are selected. Based on the location of school, the headteachers of different geographical locations (northern, central, southern and eastern parts of Taiwan) are selected. Secondly, they are selected based on the nature of the headteachers. Headteachers' different identities are the other sub-criteria for selecting participants of the research (e.g. artist, indigenous identity, professors and concurrent positions at LEAs). Background variables of these interviewees are not controlled not only because the number of these participants is small but also because the highly diverse background of headteachers can help create a ground for theorising with particular reference to inclusion in terms of headteachers' perspectives. Detailed background information of these schools and headteachers are clearly shown on Table 4.3. In reviewing the literature, it is evident that several variables are correlated with headteachers' attitudes towards, and views on, inclusion. These variables include: age, gender, years of working experience, educational qualifications, years of being a headteacher, severity of students' disability, headteachers' knowledge and resourcing and market (Center et al., 1985; Bailey & du Plessis, 1997; Barnett & Monda-Amaya, 1998; Avissar et al., 2003; Praisner, 2003; Bailey, 2004; Timor & Burton, 2006; Croll & Moses, 2000; Gewirtz, et al., 1995). Owing to the highly diverse background

of participants, information gathered from them is expected to achieve for so-called theoretical saturation<sup>26</sup>. In addition to several reasons for selecting these educational elites addressed previously, these purposively selected participants may help create a ground for theorising with particular reference to inclusion in terms of educational elites' perspectives.

### **Educational Elite Interviewing**

Conventionally, questionnaire survey is used as the most efficient method to explore people's views or attitudes. Demographic and correlation analysis can always be done easily by analysing the statistical results from questionnaire surveys but this fails to explore the participants' views and the social factors contributed to their views in more depth. This research not only attempts to explore headteachers' views on inclusion but also tries to understand what are the influential factors contributed to their views on inclusion. Owing to the limitations of quantitative methods, qualitative interviewing is used to undertake this research. As noted previously, headteachers are regarded as educational elites in Taiwan. Also, elite interviewing can help understand how these elites interpret documents, reports or policies (Richards, 1996). Therefore, the term elite interview proposed by Dexter (2006) is used to describe the process of interviewing although they are not as powerful as policy makers, legislators or politicians in Taiwanese society. He also points out that the investigator in elite interviewing is often willing and eager to let the interviewee teach him what the problem, the question or the situation is.

There are three approaches to conducting the in-depth interview: the informal conversational interviews, the general interview guide approach and the standardised open-ended interview, according to Patton (1987). He further argues that the three approaches can be conducted either separately or combined in the in-depth setting. His notion can explain why Esterberg (2002) regards in-depth interviews and semi-structured interviews as synonymous because when these three approaches are combined and used in the real interviewing setting, it is always difficult to draw a dividing line between the in-depth and semi-structured interviews. Richards (1996), on the other hand, further points out that elite interviewing should not be undertaken with a view to establishing truth, 'in a crude, positivist manner' (p. 200). Based on their notions, both of the informal conversational and the standardised open-ended approaches are used in this research in order to uncover knowledge as far as is possible.

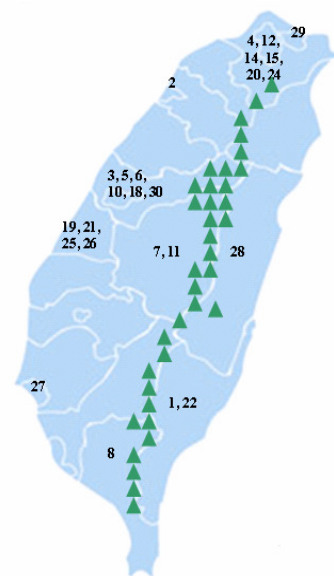
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<sup>26</sup> This term means that, no new properties and dimensions emerge from the data and the analysis has accounted for much of the possible variability' during analysis (Strauss and Corbin 1998: 158).

Precisely, the in-depth interview is conducted in a slightly informal way. Ten open-ended interview questions with further follow-up and probing questions (see Table 4.1) were produced. For the purpose of increasing the credibility of the interview questions, the contents of the questions were examined by my two supervisors. It should be noted that these questions were all translated into traditional Chinese because it is more easily to be understood by the participants. In order to validate these translated questions and increase the credibility of translation, the bilingual version of interview questions was examined by three PhD students<sup>27</sup> with high competence in Chinese and English.

Table 4.1 Ten interview questions and locations of the twenty five headteachers

- (1) In your opinion, who are students with special educational needs (SEN)?  
(Probes: Why do you think so? Should gifted and talented students belong to students with SEN? Why?)
- (2) According to your past learning or working experience, have you worked with students with SEN? (Follow-ups: Could you talk about these experiences? How do these experiences influence you?)
- (3) Have you heard of inclusion or inclusive education? Would you please give your own definition on this concept? Is there any inclusive practice being carried out in your school?
- (4) Do you discuss the issue of including students with SEN in mainstream classes/schools with your school teachers or staff?
- (5) What do you think about the idea of including students with disabilities in mainstream classes? (Follow-up: What do you think about the idea of including students with giftedness and talents in mainstream classes?)
- (6) What is your philosophy of education? In terms of managing and leading the school, what is your leadership style? What are your strategies to manage and lead the special education division at your school?
- (7) What social factors may influence your perspectives on the issue of inclusion? (Probe: How do these factors affect you and your school policy and practices?)
- (8) What are the dilemmas and challenges of implementing inclusion in Taiwan? What are your concerns and worries about the inclusion of students with SEN?
- (9) Is it a must to have special schools, special and gifted classes in education system? What is the future of these special schools, special classes and gifted classes?
- (10) Are you satisfied with the government's inclusive education policy?  
(Probes: Would you like to give some suggestions or comments?)



## Data Collection

Interview invitation letters (see Table 4.2) without offering the interview questions were posted to twenty five purposively selected participants (fifteen males and ten females). This letter includes three parts: background information, introduction of this research and the guarantee of anonymity and confidentiality. The interviewing time and date were negotiated individually by phone, email or mail. They were free to choose the most comfortable places to undertake the interviews. Interestingly, all headteachers chose their offices to do the interviews. Each interview took one to two hours or more to finish. Due to the diverse

<sup>27</sup> The three students are L. H. Hsu is from the Department of English Literature at the University of Edinburgh, H. J. Chang is from the Department of Sociology at the University of Edinburgh and T. T. Lin is from the Department of Social Welfare, National Chung Cheng University, Taiwan.

locations of all participants, the complete data collection process took me two months (from mid-November 2008 to mid-January 2009) to finish all the interviews. All interviews were digitally recorded after gaining their permissions. The strategy of clarification and elaboration on answers was used during the interview process because ‘this enabled the interviewer to have more latitude to probe beyond the answers and thus enter into a dialogue with the interviewee’ (May, 2001, p. 123). Recognising the identity of being a novice researcher, the recommendation made by Ostrander (1995) that ‘having a typed set of questions in front of you but being flexible about the order and time of the questions’ was being put into practice while interviewing (p. 149).

Table 4.2 Interview invitation letter

Dear Headteacher,

I am a PhD student at the Moray House School of Education, the University of Edinburgh. I am very interested in understanding Taiwanese headteachers’ views on the concepts of special educational needs (SEN) and inclusion and your opinions will be great help for this research. I intend to use the semi-structured interview to do this research and it may take you one to two hours. Your feedback is only for academic purpose and your anonymity and confidentiality will be guaranteed. If you are interested and willing to participate in this research, please contact me via email, telephone or mail. Thank you very much.

Sincerely,

Chia-Wen Chang

Telephone/mobile number: \*\*\* Email: \*\*\* Address: \*\*\*

## Case Studies

Examining inclusive practices of particular cases is not the main focus of this research but this evaluation cannot be ignored because it may help capture a broad picture of implementation of inclusion from a more pragmatic and practical level. It has been argued by Patton (1987) that case studies are particularly valuable when the research aims to ‘capture individual difference or unique variations from one programme setting to another’ (p. 19). Based on this notion and in order to avoid the discussion on inclusion stuck at the linguistic and rhetoric level, case studies of inclusive practices at schools become particularly useful for this research not only because they can help understand inclusion in great depth but also offer practical cases to compare with the discursive content of headteachers’ interviews. Therefore, I intend to do two case studies not only to enrich the data for this research but also to examine these headteachers’ interviews. In the research of Wu (2007) discussed in Chapter Two and Three, he has contended that there are four models of inclusive practices in the Taiwanese education context. I follow his argument and choose two inclusive models (the reverse inclusive education model and the affiliated inclusive programme) to do the case studies. The other two models are excluded from this research because first, the community-based inclusion model of two private schools is not functioning well and one is closed. This

means the implementation of this model is limited. Second, the cooperative inclusion model is merely implemented in preschool level. This research only focuses on investigating headteachers' views on inclusion from primary to secondary levels. Hence, discussion of the cooperative inclusion model is not included in this research. The two chosen schools are necessary for this research not only for the uniqueness of their inclusive practices but also for the popularity of their exposure to the mass media, including newspapers, business magazine and TV reports. Further, the government funds the two inclusive models annually and the reverse inclusion model has been implemented in some special schools in Taiwan. The affiliated inclusion model not only receives funding from the government but also supported by a national university. Owing to the comparatively high exposure of the two schools and their inclusive practices to the mass media with other schools, multiple data such as school websites, newspaper, business magazines and TV reports are gathered to compare with headteachers' interview contents and governmental policy documents to examine whether there is discrepancy between the government's inclusive policy and practice. In fact, another reason to explain why the four types of data is: time and budgets are limited and these four types of data are more easily to access. Because headteachers are often the key persons to be interviewed by newspaper, magazine and TV reporters, these multiple evidence also can serve to test the validity, reliability and coherence of the headteachers' interview contents and the government's policy documents.

Since doing case studies has its boundaries (Punch, 2006; Yin, 1994) and the inclusive practices of the two cases are so unique, the generalisability of the gathered data and the analysed results is limited. The affiliated inclusion programme offered by a public primary school affiliated to one national university, to some extent, can be regarded as an extreme case because it is so uniquely designed. These extreme cases, from Patton's (1987) point of view, can often generate particularly useful information. The chosen two inclusive models are supported and funded by the government. Up to now, as noted previously, the concept of inclusion in the Taiwanese education context is poorly defined and there are no so-called inclusive classes in mainstream schools. Investigating the two cases, supported by various data and headteachers' interviews, can directly reflect how the government understand inclusion and how inclusion is implemented in real educational arenas.

# DATA ANALYSIS

## Choice of Analytic Method

Critical discourse analysis (CDA<sup>28</sup>) is chosen as the main analytic method rather than using the more quantified positivistic methods (e.g. thematic analysis and content analysis) to undertake the analysis based on the following considerations. Firstly and methodologically, this research is a critical social research so using CDA such a qualitative analytic approach influenced by the neo-Marxism of the Frankfurt School (Rogers, 2004; Rogers, et al., 2005; Wodak & Meyer, 2009; Locke, 2004) to do the analysis is more appropriate than other analytical approaches. Secondly, the Taiwanese headteachers are educational elites and the majority of them are from public schools. Institutions may construct them in the sense that ‘they impose ideological and discursal constraints upon them as a condition for qualifying them to act as subjects’ (Fairclough, 1995, p. 39). Acting as societal elites (private headteachers) or governmental representatives (public headteachers), they must exercise their discretion to express their discourse due to the influence of their high social status or government-representative identities. Thus, a critical approach to analysing their language is essential. It may seem that analysing elites’ language belongs to the micro-level task of textual analysis. However, their discourse also represents the power and dominance from the educational structure or the societal voice and this belongs to the macro-level analysis. In order to bridge the micro-macro analytic gap and relate textual analysis to the social and political context, CDA is a better approach to achieve these goals. Thirdly, CDA is an approach which enables a research to criticise the ‘connections between properties of texts and social processes and relations (ideologies, power relations) which are generally not obvious to people who produce and interpret those texts’ (Fairclough, 1995, p. 97). Using CDA as an analytic method can help investigate critically how social inequality is expressed, constituted, legitimised by language use or in discourse (Wodak & Meyer, 2009). Concurred with suggestion of CDA researchers (e.g. Bloor & Bloor, 2007; Fairclough, 1995; Locke, 2004), focusing on challenging inequality, unfairness and injustice is essential for this research. This analytic method is applied to analyse data of the two case studies. A lengthy narrative is a pitfall of typical case study report (Stake, 1978). In order to overcome this drawback, the discussion in the case studies chapter is led, underpinned and deployed by the theoretical discussion of Chapter Three.

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<sup>28</sup> CDA as a language analysis method emerges in the early 1990s and it is characterised by the common interests in demystifying ideologies and power via investigation of written and spoken data (Wodak & Meyer, 2009). Discourse within the CDA framework is more like a type of social practice rather than just language use.



## The Process of Analysis

According to Patton (1987), analysis is ‘the process of bringing order to the data, organising what is there into patterns, categories, and basic descriptive units’ (p. 144). Firstly, the digitally recorded verbal text/discourse of the twenty five interviews is transcribed and visualised into written text/discourse. Secondly, these twenty five written texts/discourses are categorised by the ten research questions (also see Table 4.4). Each abstract category emerged and induced from every written text/discourse is coded and it is based on the frequency of emergence in different interviewees’ responses (e.g., a1, a2, a3, b1, b2, b3 and etc.). Thirdly, a social science researcher does not wander aimlessly through the data which they collect; instead, the data analysis is often driven by theories (Taylor, 2000, p. 7). As such, the theoretical context developed in Chapter Three is deployed in the data analysis process.

In order to develop a more systematic analytical context, the Fairclough’s (1995) three-box CDA model is combined as the analytic framework to facilitate the analysis. In CDA, the term critical is used more with the sense of critique (Bloor & Bloor, 2007, p. 5) and critique often aims at ‘revealing structures of power and unmasking ideologies’ (Wodak & Meyer, 2009, p. 8). More precisely, it aims to ‘investigate critically social inequality as it is expressed, constitutes, legitimised, and so on, by language use (or in discourse)’ (Wodak & Meyer, 2009, p. 10). The process of doing CDA is three-tiered. First, it is involved with description of the spoken/written language text at the local domain. Description is merely ‘a factual narrative of what happened’ (Maxwell, 1996, p. 32). Second, it is involved with interpretation of the relationship between the discursive processes (text production and text interpretation) and the texts at the institutional domain. Interpretation is engaged with ‘attaching meaning and significance to the analysis, explaining descriptive patterns, and looking for relationships and linkages among descriptive dimensions’ (Patton, 1987, p. 144). It can be seen as ‘a concrete account of that meaning and has no exploratory intent’ (Maxwell, 1996, p. 32). Third, it combines with the explanation of the discursive processes and the social processes at the societal domain. This process is illustrated in Figure 4.1. Based on this framework, various coded categories produced on Table 4.4 are re-organised as broader themes and these broader themes will be deduced, presented and discussed in Chapter Six and Seven. The second step of CDA will be largely and frequently undertaken because it helps analysing the linkage between the production of special, gifted and inclusive education policy documents and their practices. Since CDA helps analysing the relationships

between text, discourse practice and sociocultural practice, text of the twenty five interviews were read repeatedly in order to find out these relationships. The analysis of written text of interviews will not be constrained at its linguistic level. Rather, linking its linguistic meaning with how the text is produced at the institutional domain and explaining its meaning with reference to the societal domain becomes important. With the supportive evidence gathered from the two cases, the analysis of the headteachers' interviews can become more valid.

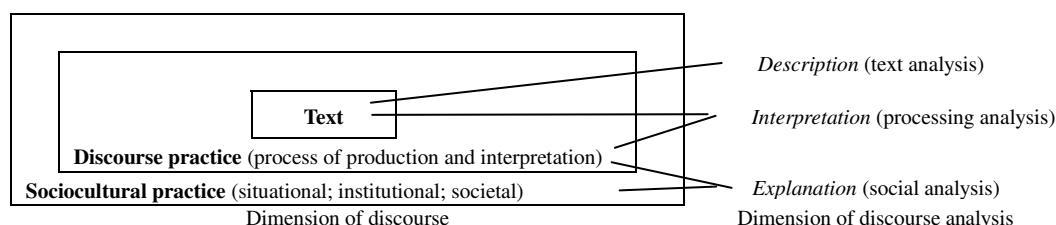


Figure 4.1 The process of critical discourse analysis (Fairclough, 1995, p. 98)

## ETHICAL CONCERNS

### Confidentiality and Anonymity

As noted already, headteachers in Taiwan have high social status so protection of their confidentiality and anonymity becomes essential. However, Walford (2005) challenges the notion of ensuring ethical norms of anonymity and confidentiality and claims more transparency in educational research. His argument, in a sense, may be theoretically correct because it is truly not easy to ensure anonymity and it is sometimes undesirable to do so. However, ensuring confidentiality and anonymity is protecting participants' rights of privacy and this protection should not be taken away simply because it is difficult to achieve. How can a researcher gain a participant's trust when neglecting his/her right of privacy? This is particularly so in this research because of the high social status of headteachers and their sensitive political nature of their roles in Taiwan. Why should a person with power and high social status trust a novice interviewer and tell him his/her personal opinions? As a matter of fact, these elites have had many experiences of taking part in research interviews. Before and during the interviewing sessions, some headteachers actively asked me to use pseudonyms or codes to replace their names in order to protect their identities. The headteacher HT 2 is one of them. The name of HT 2's school is often shown on media reports because of its unique independent inclusive campus. Moreover, details of this inclusive campus are completely included in the personal website of the director (a university professor) of this campus. The website link of this campus is being put on the main page of a national

university of education. The precise name of this school has been shown on academic journal articles without stating whether the researchers had gained the schools' agreement to reveal real names of these schools or not (e.g. Wu, 2007; Hung, 2008). This creates an interesting dilemma for me as a researcher. Apparently, some researchers, the director of this campus and its affiliated university seem to be keen to reveal the precise name of this inclusive model. The headteacher of this inclusive campus, however, asked me not to reveal name of this school, though she knew that many researchers or educational practitioners in Taiwan knew the name of this school owing to its uniqueness. In the end, I decided not to reveal real names of all participants and schools. All names of these participants and schools are replaced by codes (also see Table 4.3). This decision is made based on two purposes: first, this is for the purposes of respecting participants' rights of privacy, enhancing trustworthiness of the researcher and protecting confidentiality and anonymity of the participants. Second, doing so can also avoid creating problems for headteachers in the future, because these interviewees are elites with powers in Taiwan. Furthermore, their precise age is not shown as well, to further protect their identity.

### **Power Relationship between the Interviewer and the Interviewees**

Headteachers may be not as powerful as other elites as politicians or legislators, some researchers further argue that they sometimes can be very vulnerable (Smith, 2006). Comparatively however, my position as a researcher may be lower than these elite interviewees. How to balance the intricacy of power relationship between the interviewees and me as the interviewer has to be taken into a serious consideration, because as Desmond (2004) has argued, '...the relationship is inevitably asymmetrical...' (p. 265). Following Ostrander's (1995) suggestion, it may be a mistake to be too deferential to elites. Therefore, it becomes more important to situate and define the role of the researcher and to recognise his own value position. Although the present study may not be affected by any institute because this is not a funded project, being as self-conscious as possible is important because the researcher is the only person who possesses censorship. In order to deal with the difficulty of researching these elites and avoid obtaining simple social answers, my tripartite identity as a Taiwanese public school resource class teacher, a researcher and a PhD student was revealed to each interviewee. There are three purposes for doing so. Firstly, honesty is a compulsory virtue for a researcher (Pring, 2001) and this virtue may help build a rapport between the interviewee and the interviewer. Secondly, the researcher has to be more self-reflective and must not take things or words for granted even though he has some

background knowledge about how a Taiwanese headteacher would answer a question. When confronted with the knowledge offered by the participants' interview content, the researcher has to be more humble, modest and reflective about the knowledge. Thirdly, my tripartite identity may raise the issue of researcher bias. Since this research is situated in a critical paradigm, the intention of my analysis is to 'uncover power relationships and demonstrate inequalities embedded in society' (Rogers, 2004, p. 3). Besides, in order to enhance validity of this research, my frequent reflectivity as a researcher then becomes crucial, as Creswell & Miller (2000) have suggested. However, this does not mean that I should stop probing when these participants start to give some vague answers owing to their own social status or pressure. Instead, I also have the responsibility of playing an active and exploratory role in the knowledge expedition. These participants have agreed to take part in this research. In this sense, they are not merely passive vessels of answers. Both the interviewer and the interviewees are active participants in the interviews (Holstein & Gubrium, 2004). In other words, the participants and I are crucial actors making contributions to producing knowledge of the present study. The process of knowledge-establishing then becomes more mutual, interactive, dialogic and collaborative.

## **SUMMARY**

This chapter has addressed the two major research questions and ontological and epistemological positions of this research. The two questions are: What are headteachers' views on inclusion of students with SEN in mainstream classes? Why do they hold these views and what social factors contributed their views in a capitalist Confucian society?). In order to fill the research void but unsatisfied with positivistic knowledge regarding headteachers' views on inclusion, a qualitative approach is adopted for this research. Twenty five mainstream and special school headteachers from primary to secondary levels were purposively selected to undertake in-depth elite interviews. Each interviewee was asked ten questions and it took two months to collect all the data. Building upon the theoretical perspective addressed in the previous chapter and in order to reveal the ideological and epistemological status of headteachers' views on inclusion, critical discourse analysis approach has been applied as the analytical tool to analyse the twenty five transcribed interview data. In the process of interviewing these Taiwanese educational elites, confidentiality and anonymity were two important ethical concerns. In addition, how to balance the power relationship between the researcher and the researched was taken into consideration in this chapter as well.

Table 4.3 Background Information of the 25 headteachers and schools

The headteacher							The school											Interview date
HT	Sex	Age	EQ	YHT	YoW	Other information	ToS	LoS	% of students				Number of classes					
									Dis	Gif	Ind	Total % (N)	Sc	Gc	Rc	Ic	Total	
1	M	50s	PhD	3.5	30	This is a university-affiliated primary school in eastern Taiwan and he is a university professor of education.	*	A1	3	2	4	100 (964)	0	0	1	0	31	26/Dec/2008
2	F	50s	M	10	33	This is a university-affiliated primary school. This school has two separated campuses and one is called inclusive campus (university-affiliated inclusion model).	*	A2	5	9	0	100 (1217)	0	4	0	9	34	20/Nov/2008
3	F	40s	M	1	27	The school is located in the remote indigenous mountain area and the she has an indigenous identity.	*	A3	2	0	67	100 (108)	0	0	0	0	6	16/Dec/2008
4	M	50s	B	13	35	This is the largest primary school in Taiwan in terms of the number of pupils.	*	A4	1	0	2	100 (4800)	1	0	2	0	148	1/Dec/2008
5	M	50s	M	12	32	He used to study in a ability-differentiated class (the lower-ability level).	*	A5	1	0	1	100 (2698)	1	0	1	0	85	6/Jan/2009
6	F	50s	M	12	36	Catholic school and the tuition fee is high	**	A6	1	15	0	100 (1204)	4	6	0	0	34	11/Dec/2008
7	M	50s	PhD	11	28	He is a university assistant professor of education.	*	B1	2	3	0	100 (1250)	0	1	1	0	38	8/Dec/2008
8	M	40s	M	9	28	She is one of the members of the special education committee of one LEA.	*	B2	4	10	1	100 (912)	1	3	1	0	29	4/Dec/2008
10	F	50s	M	4	32	The school is situated in the indigenous area but she has no indigenous identity.	*	B3	0	0	55	100 (82)	0	0	0	0	9	5/Jan/2009
11	F	50s	D	5.5	32	A private school run by a Buddhist organisation. She used to be a public school head.	**	B4	0	0	2	100 (887)	0	0	0	0	27	26/Nov/2008
12	M	50s	M	20	36	Elite school (high tuition fee)	**	B5	0	0	0	100 (730)	0	0	0	0	32	17/Dec/2008
14	F	50s	PhD	10	30	Top 5 academic boy senior high school in Taiwan (high entrance score)	*	C1	1	7	2	100 (2785)	0	6	0	0	75	19/Dec/2008
15	M	50s	PhD	11	32	Top academic university-affiliated senior high school (high entrance score) and he is a university professor of education.	*	C2	1	6	0	100 (1280)	0	4	0	0	33	18/Dec/2008
18	M	40s	PhD	9	11	An extremely large private comprehensive school, including the junior high, senior high and senior vocational levels.	**	C3	1	0	0	100 (7600)	0	0	0	0	160	5/Dec/2008
19	M	50s	PhD	5	32	Top senior vocational school (high entrance score)	*	D1	1	0	0	100 (4600)	3	0	1	0	120	9/Dec/2008
20	F	40s	M	2	22	Top senior vocational school (high entrance score)	*	D2	1	0	1	100 (3648)	6	0	1	0	72	15/Dec/2008
21	M	50s	M	9	37	He used to work in a special school.	*	D3	3	0	1	100 (2202)	3	0	0	0	57	9/Jan/2009
22	M	50s	M	12	30	The school is located in remote area in eastern Taiwan. He used to be a head at a school in another small indigenous island beside Taiwan main island.	*	D4	2	0	50	100 (498)	1	0	0	0	26	25/Dec/2008
24	M	50s	M	16	30	He is an artist and also a president of one artist association.	**	D5	1	0	1	100 (3712)	0	0	0	0	75	27/Dec/2008
25	F	30s	M	1.5	16	Special school with inclusive programme (reverse inclusion model). She is the youngest head in the Taiwanese public school system. She is also a member of central government special education consulting committee now.	*	E1	39	0	1	100 (745)	27	0	0	4	40	29/Dec/2008
26	M	50s	M	8	32	Special school with inclusive programme (reverse inclusion model). She used to work in the central government sector.	*	E2	78	0	2	100 (610)	30	0	0	10	40	2/Dec/2008
27	F	50s	M	13	32	Special school with inclusive programme (reverse inclusion model)	*	E3	95	0	3	100 (355)	35	0	0	0	35	3/Dec/2008
28	M	40s	M	3	17	Special school	*	E4	100	0	37	100 (272)	22	0	0	0	22	25/Dec/2008
29	M	40s	M	4	18	Special school	*	E5	100	0	1	100 (116)	10	0	0	0	10	15/Dec/2008
30	M	40s	M	3	10	Private special school	**	E6	100	0	32	100 (155)	19	0	0	0	19	8/Jan/2009

Note: (1) HT=Headteacher; M=Male; F=Female

(2) EQ= Educational level; PhD=Doctoral; Master; D=Postgraduate diploma; B=Bachelor degree

(3) YHT=Years of being a headteacher; YoW=Years of working experience; LS=Level of school

(4) Five headteachers (HT 9, 13, 16, 17 and 23) were unable to take part in this research.

(5) By calculation, the average age of the twenty five interviewees is 51.76 years old. In order to protect their confidentiality and anonymity, their true age is not shown on this table.

Note: (1) ToS=Type of school; \*=Public school, \*\*=Private school

(2) LoS=Level of school; A=Primary (aged 6-11); B=Junior high (aged 12-14); C=Senior high (aged 15-17); D=Senior vocational (aged 15-17); E=Special (aged 4-17); Dis= Disabled students

(3) Dis=Disabled students; Gif=Gifted students; Ind=Indigenous students

(4) Sc=Special class; Gc=Gifted class; Rc= Resource class; Ic=Inclusive class

Table 4.4 Categorising the twenty five headteachers' interviews

(1) The first research question: What are Taiwanese headteachers' views on inclusion of students with SEN in mainstream classes?

(2) The second research question: Why do headteachers hold these views and what social factors contributed to their views in this capitalist Confucian society?

The second research question: Why do headteachers hold these views and what social factors contributed to their views in this context of Canadian society?																	
No.	Q1 (SEN student)	Q2 (Experience)	Q3 (Definition of inclusion)	Q5 (Inc. of D)			(Inc. of G/T)			Q7 (Social factors)	Q8 (Dilemma/barrier)	Q9 (Separate units)			Q10 (Policy/suggestion)	No.	
				F	U	UF	F	U	UF			Sc	Gc	Ss			Other issues
①	a1, a2, a3, a4		c1, c20			UF	F				f1	?	?	O		h1	①
②	a1, a3, a4, a5, a6, a7		c2	F			F					O	X	O			②
③	a1, a3	b1	c2, c3		U			U			f4	O	?	O			③
④	a1, a3, a7, a8		c4		U			U			f5, f6	O	O	O			④
⑤	a1, a3, a8	b2	c7, c8	F			F				f7	O	O	X		h5	⑤
⑥	a1, a3, a8, a4		c4		U			U				O	O	O		h6	⑥
⑦	a1, a3, a6		c2, c7		U			U	e7		f10	?	?	?			⑦
⑧	a1, a3, a6			F			F		e6, e7		f8, f9, f10, f13	X	X	?			⑧
⑨	a1, a3		c10			UF		U			f18	O	X	O			⑨
⑩	a1, a3, a7	b4	c2, c4, c9		U		F				f1, f26	O	X	?		h4, h7	⑩
⑪	a1, a3, a8, a4		c2, c4, c10		U		F				f16, f17	O	O	O			⑪
⑫	a1, a3, a8		c1, c5	F				U				O	O	O			⑫
⑬	a1, a3		c2, c6	F				U			f12, f13, f14, f15, f26	?	O	O		h1	⑬
⑭	a1, a3, a7, a8		c2, c11, c9, c12	F				U				?	O	O			⑭
⑮	a1, a3, a9		c4, c13, c14		U		F					O	X	X			⑮
⑯	a1, a3	b4	c4			UF	F		e4		f11, f19, f20, f25	?	O	O			⑯
⑰	a1, a3, a8			F				U				O	O	O			⑰
⑱	a1, a3, a8		c7		U				UF	e1	f21, f22, f26	O	O	X			⑱
⑲	a1, a3		c9, c11		U			U				?	O	O			⑲
㉑	a1, a3	b5	c4, c16, c18	F			F				f23	?	X	?		h3	㉑
㉒	a1, a3		c17, c19		U		F		e2, e3		f26	?	O	?			㉒
㉓	a1, a3, a6	b5	c4, c20	F			F		e2, e4			O	O	O			㉓
㉔	a1, a3, a7		c4, c21, c22		U			U			f24, f25	?	X	?		h4	㉔
㉕	a1, a3	b3	c2		U		F				f25	O	X	?			㉕
㉖	a1, a3		c4			UF	F				f24	O	O	O	g1, g2, g3		㉖
a1=Disabled students a2=Disability manual a3=Gifted students a4=1 <sup>st</sup> language not Chinese a5=Behavioural problems a6=Identified by LEA a7=Normal distribution a8=Socially disadvantaged a9=acquired disability caused by damage in teenage b1=Disabled people in family b2=Personal learning failure b3=Had disabled classmate before b4=had gifted classmate before b5=taught gifted students before c1=Natural state c2=Inclusion = mainstreaming. c3=Return to normal environment c4=He/she will enter the society eventually. c5=Everyone is born to be equal. c6=human rights c7=returning to mainstream classes (placement) c8=equality & justice c9=diversity & respect c10=de-labelling c11=ethnic inclusion c12=diverse value standards c13=inclusion between classmates c14=inclusion between subjects c16=equal opportunity of learning c17=equal opportunity of participation c18=Placing normal students in special schools is not inclusion. c19=including gifted students c20=The society is inclusive itself. c21=When everyone stops talking about inclusion, it is real inclusion. c22=respect disabled people Inc. of D=Inclusion of disabled students F=Favourable U=Uncertain UF=Unfavourable Inc. of G/T=Inclusion of gifted and talented student F=Favourable U=Uncertain UF=Unfavourable e1=powerful people can make decision; powerful people's influence e2=pressure of parental organisation e3=pressure of pressure group such as the public's delegates e4=parental power e5=children's educational rights e6=depending on the policy e7=credentialism + academic pressure f1=severely disabled students f2=They are guests or strangers in class. f3=severely mental and physical disabled f4=number of students (e.g. 35 per class) f5=emotional difficulties f6=class discipline f7=EBD+ADHD f8=students' IEPs f9=Taiwan's educational ecology f10=credentialism + academic pressure f11=Inclusion of curriculum is impossible. f12=human resource, human power f13=funding, subsidy, facilities f14=the government's support f15=political rhetoric (e.g. legislators) f16=teacher's overloaded work f17=Educational conscience is a dilemma. f18=disabled students' confidence and poor scores f19= Inclusion is unfair to some students & teachers. f20=parental power f21=Inclusion of some subjects is difficult (e.g. math/science/English). f22= Inclusion of some subjects is feasible (e.g. physical education/music/art). f23=students' interpersonal relationship f24=bullying & exclusion f25=Placing disabled students in competitive and selective environments is inappropriate. f26=voice from the public; making decision on inclusion based on votes and politics, not on professional judgement Sc=Special class Gc=Gifted class Ss=Special school O=Yes ?=Uncertain X=No g1=market demand & customers g2=parental choice g3=ratio of disabled student h1=flexible resource/funding allocation system h2=more funding h3=administrative support h4=teachers' profession and experience h5=mixed-ability grouping h6=friendly environment h7=inclusion of teachers																	

## **CHAPTER FIVE**

### **VIEWS ON INCLUSION OF DISABLED STUDENTS**

#### **INTRODUCTION**

This chapter presents the analytical result of the twenty five headteacher interviews. It should be noted that the results of this chapter cannot be generalised. For convenience, 'disabled students' is used to refer to those students with different disabilities in this chapter. The first section presents headteachers' overall views on inclusion. This section attempts to answer the first research question of this research. The second section illustrates the influential factors of headteachers' views on inclusion and attempts to answer the second research question of this research. This part also illustrates how the way of headteachers' understanding about disabled students affects their understanding of inclusion. The implementation of inclusion always influences the future role of segregated educational settings. Thus, the last section discusses headteachers' views on segregated special education schools and classes.

#### **OVERALL VIEWS AND DISCOURSES OF INCLUSION**

This section presents headteachers' responses to the interview question three (Have you heard of inclusion or inclusive education? Would you please give your own definition on this concept?), and question five (What do you think about the idea of including students with disabilities in mainstream classes?). My analysis of these responses attempts to answer the first research question proposed in Chapter Four (What are headteachers' views on inclusion of students with SEN in mainstream classes?).

##### **Overall Views**

Analysing the twenty five interviews reveals that these headteachers hold different attitudes towards the idea of including disabled students in mainstream classes. Overall, the larger group hold uncertain attitudes towards inclusion of disabled students (twelve out of twenty five), nine hold favourable attitudes and four hold unfavourable attitudes. Although this finding cannot be generalised due to the small numbers, it supports Chen & Lu's (1994) argument that the Taiwanese people tend to hold a more neutral attitude towards the

inclusion of disabled people in the mainstream society. This ostensibly neutral or uncertain attitude is important for Taiwanese headteachers. These headteachers may possess high social status and enormous power to influence many people, but conversely, they are also influenced by other powers such as parents, socially powerful groups, LEAs and the government. These groups have their own needs and vested interests and sometimes their needs and interests are conflicting. That is, some may support inclusion whilst some may not. Since headteachers are situated at the middle rung of the complicated educational structure, in order not to displease every party, showing a neutral or uncertain attitude may be a better solution.

## **Discourses of Inclusion**

### *The managerialist discourse*

Comparisons of the twenty five interviews indicate that eight headteachers (HTs<sup>29</sup> 2, 3, 7, 11, 12, 15, 18 and 30) regard inclusion and mainstreaming as merely two interchangeable terms. This way of understanding not only simplifies the meaning of inclusion, but also reduces inclusion into mainstreaming which is a notion stressing the accommodation and assimilation of disabled students. This is consistent with the definition of inclusion used in the government's policy paper (TMOE, 1995) but different from the definition of inclusion discussed in Chapter Three. This finding implies that the ideology 'inclusion equates to mainstreaming' articulated in the government's policy paper seems to have been imposed on these headteachers. They further consciously or unconsciously replicate the institution's ideology. As a result, these headteachers become the 'ideological and discursal subjects' of institutions (Fairclough, 1995, p. 39). This simplified view of inclusion also reflects Slee's (1997) concern that special education may 'reduce inclusive education to the functionalist endeavour of assimilation' (p. 407). The public school headteacher HT 1 describes inclusion as a 'natural state'. He uses mobile phone as a metaphor to suggest that doing inclusion is like combining small devices in a mobile phone set and,

...When they are mixed, it has an integrated function, this can be called inclusion. This is to allow every member to work harmoniously and doesn't cause disturbance and conflict.

He sees society as the mobile phone and individuals as units within it. This functionalist and natural-state discourse is different from the definition of inclusion as a process offered by

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<sup>29</sup> HT is used as an analytical code for a headteacher.



some researchers discussed in Chapter Three. This discourse implies that class order, discipline, harmony, smoothness and educational rights of the majority of students within a class are more important if we attempt to implement inclusion in mainstream classes. That is, letting class management work smoothly is a crucial issue when implementing inclusion. Some headteachers may worry about the disturbance of some disabled students or some particular types of disabled students (This is discussed in the last section.).

### *The critical discourse*

As mentioned, eight headteachers regard inclusion and mainstreaming as synonyms and believe that disabled students should be included in the mainstream classes. The private junior high school headteacher HT 11 is one of them. Although she verbally suggests that inclusion and mainstreaming are the same notions, in her further comment, she obviously does not think that they are the same concepts. She criticises the notion of ‘mainstream’:

...mainstream is doing categorisation for people. Why can you be called mainstream, but not us? We often say, ‘This is a mainstream society and that is not. This is mainstream thought and that is not.’ This contains a sense of discrimination.

Following her comment, if the concept of mainstream contains the notion of discrimination and inclusion equates mainstreaming, this implies the implementation of inclusion promotes discrimination. This is irrational. This conceptual confusion and self-contradiction of understanding reflects some researchers’ worry that the multiple-interpreted term inclusion can be a threat to inclusion *per se* (Feiler & Gibson, 1999). When inclusion is translated into practice, it can be achieved in various ways. However, whether the so-called inclusive practices are real inclusion is highly questionable (This will be discussed in Chapter Seven.).

The term ‘disabled/gifted citizens’ used in the Act does not appear in all interviews even once. It is also apparent that, human/civil rights and equality and justice, the two themes with reference to inclusion are lacking in these interviews. However, it cannot be claimed that every headteacher neglects this issue. For example, headteachers HT 5 and HT 14 indicate that inclusion is related to fairness, equality and justice for disabled students. The top senior high school headteacher HT 15 also critically adopts the civil rights approach in his views on inclusion:

...[Inclusion] is fair for these students...disabled students have limited abilities, so whether the surrounding environment is able to support them to live and study with other people is their human rights... this [inclusive] education model is taking a stand on the principle of respecting human rights.

HT 20 also takes a stand on the principle of equality, but she criticises the idea of full inclusion from the opposite perspective. She indicates that including all disabled students in mainstream classes is unfair for the disabled students themselves, the non-disabled students and teachers. She argues that when teaching, teachers may need to pay more attention to these disabled students and the entire teaching progress may be delayed. These disabled students may be unable to catch up with other students and their learning may be affected as well. This discourse also takes the class management into account. She concerns about that the smoothness and order of teaching in the class.

### *The school as a microcosm of society discourse*

The discourse that school is a microcosm of society appears in ten headteacher interviews (HTs 1, 4, 6, 11, 12, 19, 20, 25, 27, 28 and 30). These headteachers think that disabled students will enter the society eventually so inclusion for them is needed. This discourse situates schooling in a broad social context and regards school as a miniature of society. Some headteachers such as HT 6 and HT 22 further indicate that ignoring disabled people is inappropriate because they can be easily found in our daily life and they may be our relatives and friends or people surrounding us. Within this discourse, respecting 'diversity' is another theme. The primary school headteacher HT 1 thinks that

...Including different students in mainstream classes does have its advantage because children can understand the society is actually a diverse society. This diversity includes different ethnic groups, languages, body shapes, learning abilities or aptitudes. So, what we mean by special really depends on how we define it.

HT 1's comment reveals the importance of understanding disabled students. It also expands the notion of inclusion to a wider and more diverse group of people.

## **INFLUENTIAL FACTORS ON HEADTEACHERS' VIEWS**

After addressing headteachers' views and discourses on inclusion, the following sections not only present the headteachers' responses to the interview question seven (What social factors may influence your perspectives on the issue of inclusion?), but also attempts to answer the second research question (Why do headteachers hold these views on inclusion and what personal and social factors contributed to their views in this capitalist Confucian society?)

## Understanding of Disabled Students

The first personal factor contributed to headteachers' views on inclusion is their understanding of disabled students. This concurs with Barton's (1998) argument that the way of understanding disability influences the way of understanding inclusion. By analysing, headteachers' understanding of disabled students can be groups as two perspectives.

### *The functionalist perspectives*

It is a common theme emerged from the interviews that headteachers taking the functionalist approach to address their understanding of disabled students. Some headteachers view students' disabilities based on their innate abilities and they use the IQ normal-distribution model to dichotomise students with SEN into the disabled and the gifted groups (e.g. HTs 4, 11, 18 and 28). Some public school headteachers think that, as long as students who are identified and assessed by the Identification, Placement and Guidance Committees (IPGCs) of LEAs, they are all students with SEN (e.g. HTs 2, 7, 8 and 27). According to Chapter Two and Three, adopting the functionalist approach to undertake the identification work is more favoured by the IPGCs. IQ and achievement test results play crucial roles<sup>30</sup> because this can enhance the efficiency and let the system work smoothly. Also, the entire process is being regarded as professional. These headteachers' responses support Skrtic's (1991) argument that society often assumes that the professions' specialised knowledge is useful and adequate. Acting as the government's representatives, this bureaucratic, expedient and functionalist way of understanding students with SEN (disabled and gifted students) allow public school headteachers to rely on the IPGCs' standards. As such, headteachers' responses to their clients and the management of school tasks can work more efficiently and effectively. The four headteachers' feedback also reflects the influence of capitalism on them as well as on the IPGCs. Under the consideration of limited resource, simplifying tasks and differentiating clients are necessary for street-level bureaucrats and managers in public sectors (Lipsky, 1980). However, this way of simplifying, differentiating and dichotomising students into two groups is jeopardising the way of understanding SEN itself because not all disabilities or giftedness can be understood simply based on this normal distribution model.

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<sup>30</sup> The identification work of students with SEN of the IPGCs is highly based on the Standards of Assessing and Diagnosing the Disabled and Gifted Students as mentioned in Chapter 2. IQ and achievement tests are used as main techniques to identifying students with disability and IQ and achievement tests; national competitions as main methods to identifying students with giftedness (TMOE, 2006)

### *The critical perspectives*

Adopting the materialist approach to understand disability is rarely seen in all the twenty five interviews. The artist headteacher HT 24 is an exception. In his interview, he indicates that people often use euphemistic terms to describe the disadvantaged groups. He thinks that this embellishment in language sometimes may make the truth blurred. He further comments that 'some people may use disability to gain some interests... and this happens again and again'. Owing to the time limit, he does not explain what these interests are. However, his comment implicitly reflects some researchers' claim that the disability can be a notion produced by some dominant powerful people (e.g. Tomlinson, 1982; Barton & Tomlinson, 1981 & 1984). Disability can be seen as a product and this product is rationalised by the powerful people to maintain their vested interests and control on some particular groups of people. However, none of the interviewees who holds important positions in the government or in academia sees students with disabilities from this perspective. Whether this perspective is consciously or unconsciously neglected by these powerful people requires further investigation.

Some headteachers critically hold the social constructionist perspectives, seeing students' disabilities as socially constructed entities. The private school headteacher HT 6 indicates that the entire society is changing so fast that students' disabilities should not merely be understood as their innate entities. It may be possible that the society is disabling them. Her comment directly challenges the Act and the identification standard used in Taiwan because the way of understanding and identifying learning disability (LD) stated on the Act and the identification standard is highly essentialistic and social influences are ignored (also see Chapter Two). The private special school headteacher HT 30 is another case. He says that his school accommodates many students with blindness and some of them have extraordinary music talents even though they are identified as multiple-disabled students. He often feels that it is unfair to judge these disabled students simply based on able-bodied people's standards. Since these standards are all socially constructed by people, whether using these standards to identify disabled students is fair for them is questionable. The two headteachers' comments also raise the issue of stigmatisation and labelling. Non-disabled people do not like socially-constructed labels or stigmas, nor do disabled people like them. Thus, two headteachers (HTs 10 and 12) point out that one of the reasons to promote inclusion is because parents of disabled students worry about their children being labelled and stigmatised.

## Other Personal Factors

Besides headteachers' personal understanding of inclusion and disabled students, there are another four personal factors which may be influencing their views on inclusion. These are: gender, age, seniority of working experience and seniority of being a headteacher. Firstly, as discussed in Chapter Three, previous studies regarding headteachers' views on inclusion do not clearly show the influence of gender on their attitudes. However, female headteachers (five out of ten) are found to be more favourable of the idea of inclusion of students with disabilities than male headteachers (four out of fifteen) in this research. Comparatively, more male headteachers (nine out of fifteen) hold uncertain attitudes towards this idea (see Table 5.1). Although it has been argued that female leaders tend to be more caring and aware of individual differences (Gray, 1993), whether this caring nature is associated with the favourable attitude or belief about inclusion there is still a need to examine. For instance, the special school headteacher HT 27 says that she is born to be benevolent so she likes to help and take care of people in disadvantaged conditions. She also supports the inclusion of mildly disabled students in mainstream classes. By contrast, another senior vocational school female headteacher HT 20 says that she has been continually influenced by Buddhism so she has a 'soft heart' and she is also very benevolent and caring to the disabled people. But, she is doubtful about the inclusion of disabled students because the issue of inclusion is strongly related with other issues such as equality and rights of other non-disabled students and teachers and parents' rights of choice of education.

Table 5.1 Views on inclusion of disabled students (compared by gender)

Gender	Favourable	Uncertain	Unfavourable	Total
Male	4	9	2	15
Female	5	3	2	10

Secondly, no headteachers reveal the influence of age on their view but Table 5.2 shows that eight headteachers in their 50s hold uncertain attitudes towards inclusion of disabled students in this research. It has been found that the older the headteachers are, the fewer full-inclusion practices they implement in Israel (Avissar et al., 2003). Their quantitative study may be unable to be used to make a comparison with this research. Clearly however, the ratio of holding an unfavourable attitude towards inclusion is higher in the group of headteachers in their 40s (three out of nine) than those in their 50s (one out of fifteen) in this research.

Table 5.2 Views on inclusion of disabled students (compared by age)

Age	Favourable	Uncertain	Unfavourable	Total
51-60	6	8	1	15
41-50	2	4	3	9
<40	1	0	0	1

Note: The average of the twenty five headteachers' age is 51.76.

Thirdly, it is found that headteachers' seniority of working experience may have influence on their views on inclusion. The public special school headteacher HT 26 indicates that

...the experience of education administration work and the process of special education administration work may all have influence on me, and my attitude changes.

As mentioned in Chapter Two, the route to becoming a Taiwanese headteacher is long and competitive and it requires years of teaching and administrative experience. According to Table 5.3, the seniority of working experience of most headteachers is more than twenty years. It can be found that ten headteachers with more than twenty years working experience hold uncertain attitudes towards inclusion. In the same group, the number of headteachers whose views of inclusion are unfavourable is comparatively small (three out of twenty). According to Table 5.3, it also can be found that even though Taiwanese headteachers are well-experienced educational practitioners, they remain to hold reserved views on the idea of inclusion.

Table 5.3 Views on inclusion of disabled students (compared by seniority of working experience)

Years of working experience	Favourable	Uncertain	Unfavourable	Total
1-20	2	2	1	5
21-40	7	10	3	20

Note: The average of the twenty five headteachers' seniority of working experience is 27.9 years.

Fourthly, headteachers' seniority of working experience is found to have influence on their views on inclusion as well. Table 5.4 shows that no headteacher of Group B holds unfavourable attitudes towards inclusion. Comparatively, four out of sixteen less experienced headteachers in Group A are not supportive of inclusion. This may imply that the longer a headteacher has been in post, the less likely he/she is to hold unfavourable attitudes towards inclusion.

Table 5.4 Views on inclusion of disabled students (compared by seniority of being a headteacher)

Group	Years of being a headteacher	Favourable	Uncertain	Unfavourable	Total
A	1-10	6	6	4	16
B	11-20	3	6	0	9

Note: The average of the twenty five headteachers' seniority of being a headteacher is 8.3 years.

## Social and Other Factors

The formulation of headteachers' views or ideologies cannot merely be attributed to their personal factors because they play vital roles within schools and the entire education structure. Social factors may shape their ideologies and views. Also, headteachers' views are affected by the barriers and dilemmas which they have encountered based on their years of working experience. In the following sections, therefore, I present four major social and other factors contributed to their views on inclusion. These four themes are emerged from responses of the interview question eight (What are the dilemmas and challenges of implementing inclusion in Taiwan? What are your concerns and worries about inclusion of students with SEN?). These responses also attempt to answer the second research question (see page 70, Chapter Four).

### *Type, level and location of school*

As far as type of school is concerned, three mainstream school headteachers (HTs 1, 10 and 20) and one special school headteacher (HT 30) hold unfavourable attitudes towards inclusion (also see Table 5.5). Headteachers HT 1 and HT 10 indicate that including all disabled children in mainstream classes is inappropriate because there are always some disabled students in need of separate educational provision. Comparatively, the senior vocational school headteacher HT 20 and the private special school headteacher HT 30 hold more negative views on full inclusion. HT 20 points out that: students at the senior high school level are selected and these non-disabled students are far more capable than disabled students in many aspects. In terms of academic subjects, inclusion of the two groups of students seems to be impossible. She therefore comments that the implementation of inclusion is unfair for disabled and non-disabled students and parents.

Table 5.5 Views on inclusion of disabled students (compared by type of school 1)

Type of school	Favourable	Uncertain	Unfavourable	Total
Mainstream	7	9	3	19
Special	2	3	1	6

Because of the small number of private school headteachers, it is difficult to make a comparison between the public and private school headteachers' views on inclusion. However, it still can be found that the ratio of private school headteachers holding uncertain attitudes towards inclusion (four out of six) is higher than the ratio of public school headteachers (eight out of nineteen) (see Table 5.6).

Table 5.6 Views on inclusion of disabled students (compared by type of school 2)

Type of school	Favourable	Uncertain	Unfavourable	Total
Public	8	8	3	19
Private	1	4	1	6

When comparing headteachers' views on inclusion in terms of level of school, this research shows that approximately half of the headteachers - three out of six in primary and six out of thirteen in secondary - hold uncertain attitudes towards inclusion (see Table 5.7). The three senior high school headteachers all hold favourable attitudes towards inclusion. However, the percentage of disabled students of the three schools is very small (less than 1%) and two schools are selective top senior high schools with high entrance scores (schools of HT 14 and 15) (also see Table 4.3 in Chapter Four). Even if the headteachers are in favour of inclusion of disabled students in mainstream classes, disabled students will be excluded and not selected because of the competitive national examination selection mechanism. That is, unless the entire education system is being changed, disabled students will find it very difficult to be included in this type of school.

Table 5.7 Views on inclusion of disabled students (compared by level of school)

Level of school	Favourable	Uncertain	Unfavourable	Total
Primary (aged 6-11)	2	3	1	6
Secondary (aged 12-17)	5	6	2	13
Junior high (aged 12-14)	1	3	1	5
Senior high (aged 15-17)	3	0	0	3
Senior vocational (aged 15-17)	1	3	1	5

Some headteachers identify geographical difference as one factor which may have influence on the implementation of inclusion. The primary school headteacher HT 8 indicates that

I think there is urban and rural difference. If it [full inclusion] is implemented in Taipei<sup>31</sup>, I think the time is right to do it.

The private junior high school headteacher HT 12 has the same opinion and he further explains why full inclusion is comparatively easy to achieve in the capital of a country, because

...it is near the political and economic centre...also, the complete educational level is higher there so parents have higher demand for the quality of education.

The senior vocational school headteacher HT 22 sees the geographical issue from a different angle. He indicates,

If this is a socio-economically high area, a problem will occur because parents here have higher demand for their children's education quality. They will be afraid of that the inclusion of these [disabled] children may separate and eat away the resources.

<sup>31</sup> Taipei is the capital of Taiwan.



However, the primary school headteacher HT 3 who works in a remote indigenous area points out that it is less difficult to do inclusion in a school like hers. Her school contains 108 students only and 67% of them are indigenous students. There are only six classes in this school. No matter a student is identified as disabled or not, the classes have to accommodate every student. So she further respond that 'We don't need to decide where the students study because we only have one class for each grade...students in our school have less academic pressure compared with those urban children...teachers have more flexibility to teach in order to meet students' needs'. The following paragraphs discuss the influence of parental power on headteachers' views on inclusion.

### *Voice of parents with non-disabled children*

As discussed previously, there are more private school headteachers holding uncertain attitudes towards inclusion than public school headteachers (see Table 5.6). A quote from the private elite junior high school headteacher HT 12 can explain why private school headteachers tend to hold a more uncertain attitude towards inclusion. He comments,

...Parental power can be the factor which influences my policy the most and does cause me some pressure... Actually, most private schools are influenced by parents.

His response highlights the influence of parental power on headteachers' views on inclusion. He further addresses his dilemma of including disabled students in private school:

...This is a dilemma. Can I refuse to enrol these children? We are running an educational enterprise, we shouldn't do so. If you accept him...we had one case already. Some parents transfer their children to other schools simply because of this [disabled] child. One student's transferring is so crucial for us because this private school doesn't receive any subsidy from the city government at all...parents will transfer their children out if their children's learning is affected and disturbed.

Another private junior high school headteacher, HT 11, also gives similar feedback,

Parents are my customers and, of course, they are indirect customers. My direct customers are the students...In public schools, teachers sometimes can reject some special students to come in their classes; however, it's not allowed in private schools...We didn't know he has ADHD...since he has enrolled and paid the tuition, then we must serve...

The private primary school headteacher HT 6 links parental influence with the dilemmas of school management and the market of private school, she says,

...If parents' attitudes towards these kids do not change, it can be a big trouble for school

administration because they may come to my office and tell me 'If you don't transfer that kid out, I will transfer mine.

Parents' reluctance to let schools place disabled students in mainstream classes not only occurs in private schools, but also in public schools. Public senior vocational school HT 20 says that some parents with power may jointly sign a document and hand it to her office, and declare that they do not want the disabled student to be included in the mainstream class. Another public junior high school headteacher HT 8 takes a more serious attitude and indicates that the issue of inclusion may cause societal attention if the issue continues being fermented:

...parents who are not supportive of inclusion will stand out and fight for their children. The society which is not supportive of inclusion will do the same thing as well and it will become a societal movement...of course, another voice from people who want equal education right will emerge on the other hand and they are often the education reformers...

### *Competitive credentialism*

As discussed in Chapter One and Two, fierce competition is one distinctive feature of the Taiwanese education system. The foregoing discussion of parental influence on headteachers' views on inclusion is also strongly associated with the collectively credentialistic ideology. Influenced by credentialism, some headteachers points out that their views on inclusion are influenced by this phenomenon. The junior high school headteacher HT 8 contends that almost every junior high school has pressure of credentialism and credentialism affects the entire Taiwanese educational ecology. This competitive and selective ideology does hinder the implementation of inclusion. She says that some schools produce rankings of academic performance after school-wide exams. Those classes contain disabled students tend to have lower average scores in these rankings. She further says,

...You know what? After the ranking is published, I heard that some headteachers call the class teachers to their offices and condemn them for their poor academic performance.

The senior vocational school headteacher HT 22 points out a similar concern about the influence of credentialism and academic competition on inclusion. She argues,

Take the elite school for example, when you include these [disabled] children in, they [parents] may worry about these [disabled] students may decrease and undermine their competitiveness.

This concern not only shows up in senior vocational school headteachers' interview but also appears in the primary school headteacher HT 1's discourse. He argues that including

severely disabled students in mainstream classes can damage these disabled students because they are 'strangers' or 'guests' of a class. When learning is beyond their abilities, they may not benefit at all. The special school headteacher HT 28 hence indicates,

If we put an intellectual disabled student in the most competitive and top school in Taiwan, is it inclusion? I think it's not.

These discussion is consistent with various researchers' worry that overemphasis on competition, a form of market-led ideology, and meritocracy can become the stumbling block to implement inclusion (Evans & Lunt, 1994; Barton, 1998 & 1999). The special school headteacher HT 25, however, uses her previous teaching experience to suggest that including disabled students in a competitive mainstream environment may be not necessarily an inappropriate placement. She says that she taught one student with a moderately visual impairment when she was a mainstream senior high school teacher. The disabled student's parents asked him which type of education he wished to receive, and he decided to study in a mainstream class of a selective and competitive top school. In the mainstream class, he was always at the bottom level in terms of academic performance but he did not regret this decision. She further says,

When he graduated, he received a graduation certification from a mainstream school, not from a special school...also, stimulation and support of peers were of great help...this was what segregated special educational settings could never offer...and he is in the university now.

Her feedback neglects one fact that the disabled student in this school has been selected based on his ability as well. Those with severe disabilities may not be able to be included in this school. So, if severely disabled students are included in this type of school, whether they can succeed or have similar positive results is questionable. In other words, this type of inclusion is conditional and its comprehensive implementation is conditional as well.

### *Powerful people, the government and politics*

Besides the foregoing discussion, the influence of other powerful people, the government and political power on headteachers' views on inclusion are significant. The influence of powerful people on their views is indirect. The special school headteacher HT 26, for example, indicates that the Taiwanese inclusive policy is hurriedly constructed and partly influenced by pressure of the public representatives and parental pressure groups in the society. His response reveals the following two issues.

Firstly, his response appears to raise questions about whether any inclusive education policy is available in Taiwan. To investigate this further, I use the interview question ten (Are you satisfied with the government's inclusive education policy?) to test the twenty five headteachers' understanding about the government's inclusive education policy. The responses are vague and diverse. Some headteachers reply that the government has promoted inclusion and has had a clear inclusive education policy for many years (e.g. headteachers HTs 12, 19 and 26). HT 26 claims that the government's White Papers and the Act also promote inclusion. The majority of headteachers, however, all respond that they receive very little or no information regarding inclusion from the government (e.g. HTs 2, 4, 8, 14, 18, 20 and 22). I also ask all the headteachers to name any particular Act, regulations or official documents regarding inclusion and inclusive education. The answers are merely the Act (TMOE, 1994), the 1995 special education Report (TMOE, 1995) and the Gifted Education White Paper (TMOE, 2008) described in Chapter Two. The issue of inclusion in the three documents, as I demonstrated in Chapter Two and Three is not frequently mentioned and emphasised. The junior high school headteacher HT 8 points out that

A headteacher can't change the policy...a headteachers' role is simple. What you [the government] say, what we do! ...policies are important.

This discourse shows that the public headteacher HT 8 seems to play a more passive role and waits for the government's policy and instructions to implement inclusion. Combining HT 8's response with the government's vague stance on inclusion discussed in Chapter Three, this may lead to headteachers' vague understanding and uncertain views on inclusion.

Secondly, HT 26's comment on the Taiwanese inclusive policy and its implementation also reveals the intervention of political power in educational policymaking. The private junior high school headteacher HT 11 indicates,

Regarding inclusion, what concerns me the most is our government itself... our government...sometimes it gives in to some people. For example, it sometimes gives in to the group who shout louder.

Her response implies that the government's decision and policymaking may be influenced by different powerful groups. However, this is endangering the policy itself because:

Doing this is for the votes...just like the Ministry of Education...it often listens to those with louder voices but does not make judgement on the ground of professional knowledge.

The senior high school headteacher HT 15 also addresses a similar concern. His criticism is that the implementation of inclusion involves the issue of resource allocation but this issue is linked to politics. He says, 'Legislators always say that we cannot impoverish education for children. In fact, funding and subsidies for schools are extremely limited and schools are poor'.

Linking politics with inclusion is a continuingly lacking theme in inclusive research in Taiwan. Within the twenty five interviews, only these three headteachers draw attention to the political issues surrounding inclusive education in Taiwan and express concerns about the intervention of political power in education. The remaining twenty two have nothing to say on this subject.

## **VIEWS ON SEGREGATED EDUCATIONAL SETTINGS**

The implementation of inclusion has effects on the future of segregated special educational setting. Therefore, the last section of this chapter presents responses to the interview question nine (Is it a must to have special schools, special and gifted classes in education system? What is the future of special schools, classes and gifted classes?).

### **Overall Views**

As mentioned in Chapter Two, special classes in mainstream schools and special schools are two major forms of segregated special education provision for disabled students. As far as the future of special education school is concerned, the majority of headteachers (fifteen out of twenty five) think that there is a continuing role for special school. This finding is similar to the research undertaken by Croll & Moses (2000a). As discussed in Chapter 3, they have interviewed forty eight headteachers in the UK and all of them think that there is a continuing role for segregated special schools. Comparatively, there are at least three Taiwanese headteachers (HTs 5, 19 and 22) in this research think that the continuing role for segregated special school is unnecessary (also see Table 5.8). For example, HT 22 says that the society does not need any special school because there are special classes and gifted classes available in mainstream schools already. As far as special classes for intellectually and physically disabled students are concerned, the majority of the headteachers (nineteen out of twenty five) indicates that there is a continuing role for this type of provision in the mainstream education system. The junior high school headteacher HT 8 is the only one

saying that it is unnecessary to have special classes in mainstream schools. Owing to the time limit, she explains why she thinks that the transformation of special education classes is considerably difficult in a short sentence. She thinks that it is because this may involve reform of the entire education system.

Table 5.8 A comparison of Taiwanese and British headteachers' views on the continuing role for separate special school

Research	Country	Methods	Yes	No	Total
This research	Taiwan	Interviewing	15	3	25
Croll & Moses (2000a)	UK	Interviewing	48	0	48

The senior vocational school headteacher HT 20 is the one who disagree with the idea of full inclusion. She supports the continuing role of segregated special education classes. She indicates,

...If we don't establish special classes at schools and we simply put disabled students into normal classes, their performance will be always at the bottom level of the class. When they graduate, they will remain to stay at the bottom level of the society... if we establish special classes and offer them professional training, the situation may change. So, not implementing inclusion sometimes is not a bad thing.

HT 20, however, seems to over-optimize the function of segregated educational setting for disabled students. His response implicitly suggests that segregated educational setting may be able to promote social mobility of the disabled group. As a matter of fact, segregated special education continues to serve as a reproductive mechanism of social inequality (Tomlinson, 1982; Chang, 2007).

## **Influential Factors**

### *Type and severity of disability*

Although the research of Croll & Moses (2000) does not put emphasis on explaining why the forty eight headteachers hold these views, in their findings, the majority of British headteachers (66.7%) think that children with EBD should be educated in special schools. This is different from Taiwan's context because special schools in Taiwan mainly accommodate disabled students with moderate or severe intellectual or physical disabilities. Students with EBD are basically placed in mainstream schools. This does not mean that the type and severity of students' disabilities do not affect headteachers' views on these disabled students and their inclusion. The private primary school headteacher HT 6 explains her concern about full inclusion. She says,

Our school is famous for its top music training programme and academic performance...Full inclusion is definitely a dangerous thing...for some parents whose kids are in mainstream classes, they may care about whether their kids will be influenced or threatened by students with EBD.

Another public primary school headteacher HT 2 also highlights the same issue. She specifically points out that inclusion of some particular types of disabled students is considerably difficult, such as those with EBD, ADHD and severe difficulties. Headteachers HT 3 and HT 4 also look unfavourable on the inclusion of severely disabled students because they also worry about disturbance of the entire teaching process in mainstream classes.

*Parental demand, identification ratio of disabled students and free market policy*

Another influential factor contributed to headteachers' views on the continuing role of special school is related with its market and consumers. The emergence of the special education school market is concerned with two sources: demand of the child and the parents and identification ratio of disabled students. The headteacher of a private special school HT 30 focuses on the two sources and indicates that he does not worry about the future of special school at all because:

...Parents have the need, and children have the needs as well. In fact, it [special school] is like a company, a product. You have to define your product based on the market...3% of the Taiwanese people are disabled groups...It's 2009 now. This ratio doesn't decline much when compared with 1999...let's be practical, it has its own market demand.

This response reveals the fact that the demand for the special education school market not only comes from the child and parents. The continuing identification of disabled students also makes contribution to the continuing existence of the special education school. The public special school headteacher HT 29 applies the criminological concept 'dark figure of crime' to elaborate the over-representation of disabled people. He indicates:

This is related with the concept of dark figure of crime. It means that the number doesn't represent what it should represent. I am always very curious why the number of disabled people is not decreasing in these years? ...This involves the identification of disabled people. Some people may throw the wider net and issue a certificate [of disability]. I am afraid that there may be some 'fake' disabled people in this group...

To a large extent, HT 29's feedback also echoes with the HT 24's critical comment on the continuing emergence of the disabled groups discussed previously in page 4. Following the two headteachers' comments, it seems that there are some dominant powerful people

continue identifying and producing disabled students for their own interests. The two school managers' discourses vividly support Tomlinson's (1982) claim that 'the more children thought to be in need of special education the more work for the professionals' (p. 83). HT 29 further identifies another source of maintaining the special education school market. He attributes it to the government's policy, he indicates,

...Everybody is expecting that the special education school market will wither...Why the number of classes in my school continues increasing year by year? ...In fact, the Ministry of Education still implements the open free competitive market so parents can freely choose where to let their children receive education. This is to say that I don't need to worry the concept of mainstreaming or inclusion can make the special education school market wither...

To summarise, both parents and powerful and professional people are all involved in sustaining continuing roles of segregated special education settings.

## **SUMMARY**

Analysis of the twenty five headteacher interviews reveals that the majority of headteachers hold reserved attitudes towards inclusion. There are three major discourses regarding inclusion of disabled students: the managerialist discourse, the critical discourse and the school as a microcosm of society discourse. Headteachers who articulate the first discourse tend to regard mainstreaming and integration as synonymous. The second and third discourses are articulated by those holding favourable attitudes towards the inclusion of disabled students. Furthermore, the majority of them still think that segregated educational settings are necessary in the entire education system. Their views on the inclusion of disabled students are influenced by various factors, such as their understanding of disabled students and inclusion, gender, age, seniority of working experience and being a headteacher. Other social factors affect their views on inclusion as well. These factors include type, level and location of school, parental power, collectively credentialistic ideology, other powerful people and the government itself. Some of these factors may promote the comprehensive implementation of inclusion whilst some may become barriers and dilemmas for promoting inclusion.



## **CHAPTER SIX**

### **VIEWS ON INCLUSION OF GIFTED AND TALENTED STUDENTS**

#### **INTRODUCTION**

This chapter is regarded as an extended part of the previous chapter and it attempts to present headteachers' views on the inclusion of gifted and talented students. As noted in the previous chapter, the results of this chapter cannot be generalised due to the small number of interviewees. For convenience, 'gifted and talented students' is used to refer to those with different giftedness and talents. In the first section, I present headteachers' overall views and discourses on the inclusion of gifted students. This section attempts to answer the first research question of this study. The second section presents the influential factors of these headteachers' views and attempts to answer the second research question. This part also illustrates how headteachers' understandings about gifted and talented students influence their views on inclusion. The implementation of inclusion affects the future of segregated gifted classes. The third section therefore discusses headteachers' views on this type of educational provision.

#### **OVERALL VIEWS AND DISCOURSES OF INCLUSION**

##### **Overall Views**

To date, inclusion of gifted students in mainstream classes has always been a subject about which little is known in research and this research attempts to fill this void. Analysis of the twenty five headteacher interviews reveals that they have no consensual views on inclusion of gifted students in mainstream classes. According to Table 4.4 in Chapter Four, thirteen of them hold favourable attitudes, eleven hold uncertain attitudes and only one holds an unfavourable attitude towards inclusion of gifted students. Although this result cannot be generalised, it appears that headteachers' attitudes tend to fluctuate between the favourable and uncertain options. Their diverse opinion on the inclusion of gifted students is explained in detail below.

## Discourses of Inclusion of Gifted Students

Analysis of the twenty five interviews shows that there are three discursive themes surrounding headteachers' views on inclusion of gifted students. They are: the school as a microcosm of society discourse, the privileged class discourse and the dilemmatic discourse. The first two discourses are articulated by headteachers who hold favourable attitudes towards inclusion of gifted students whilst the third discourse is articulated by those holding uncertain attitudes. Headteachers holding unfavourable attitudes towards inclusion may support the continuing role of segregated gifted classes. This is discussed in the last section of this chapter.

### *The school as a microcosm of society discourse*

This discursive theme not only appears in headteachers' views on inclusion of disabled students in the previous chapter, it also shows in their views on inclusion of gifted students. Four headteachers indicate that gifted students should be included in mainstream classes because they must enter the society eventually and work with diverse groups of people in their daily life (e. g. HT 5, 7, 11 and 25). For example, the junior high school headteacher HT 11 indicates that,

...they should be included in mainstream classes because after they enter the society, they may not meet so many gifted people as they meet now at school.

The primary school headteacher HT 5 further proposes the advantage of including gifted students in mainstream classes. He thinks that when a class is mixed with students with diverse abilities, such as gifted and disabled students, the gifted group can always help the disabled group. When gifted students have experiences of working with the disadvantaged group, gifted students can know better how to help these disadvantaged people in the future. The senior vocational school headteacher HT 19 also points out that gifted students' personality is more likely to be arrogant and selfish. So, if they do not have experience of working with people with normal or lower abilities and understand humanity, their personality may not be accepted by other as well. Thus, the special school headteacher HT 25 indicates,

Actually, every member can learn from each other in a heterogeneous group. This is like our society and we should not categorise them... if a gifted student has no experience of contacting with other normal or disabled students, he may not know how difficult it is for them to study in the class... when he [a gifted student] has the opportunity to serve the society, he then can take his previous learning experiences into consideration and help these disadvantaged groups.

### *The privileged class discourse*

Some headteachers in the interviewing process are so reflective of the gifted education system that they explicitly take critical stances to unveil the issue of educational and social inequality of gifted education. This stance not only explains why they support inclusion of gifted students but also reflects Sapon-Shevin's (1993) argument that schooling may 'create and perpetuate existing social and educational stratification by providing children with vastly different educations and possibilities' (p. 26). The primary school headteacher HT 5 argues that segregated gifted education may make these students' status more privileged so inclusion of this group of students is necessary. The issue of teacher of the gifted class is a shared theme expressed by the junior high school headteacher HT 8 and HT 11. The former reveals that quality of teachers and facilities in gifted classes is always better and the latter precisely criticises the issue of arrangement of student-teacher ratio:

They really take all the advantages. They take all the advantages [she emphasises] ...There are three teachers in one gifted class, do you know that? ...In mainstream class, there are one to two teachers only.

Owing to the privileged status of gifted students, HT 8 hence suggests that 'equal distribution of resources' is crucial when implementing inclusion of gifted students. The special school headteacher HT 26 who supports inclusion of gifted students criticises the segregated gifted education setting, based on his previous working experience in the central governmental sector,

When I was working in the Central Region Office, Ministry of Education, I undertook a follow-up research on mathematically and scientifically gifted students... They are supposed to do mathematical and scientific research but the majority of them see that entering medical schools is the most important thing for them. And half of these students are in medical schools now.

Studying in medical schools is comparatively expensive than other disciplines but the successful graduates gain their monetary rewards and high social status soon in Taiwan. His comment not only reveals the social value of a particular group of people but also identify the unequal nature of gifted education. The senior vocational school headteacher HT 21 takes a stand on the principle of equality and comments on the segregated gifted education classes that offering resources to a small group of gifted students may damage interests of the majority of people. He further focuses on the training courses spent on the music gifted classes and comments that:

...Subsidy spent on music talented classes from the government is very high. ...and music training courses in many public schools are government-funded... a small group of people take advantage of the interests.

HT 5 therefore comments that if these gifted students are always 'enshrined in segregated classes', they can never be able to come back to the mainstream. In this regard, the educational 'equity and justice' is missing. His comment is similar to the criticism made by Sapon-Shevin (1993) that sending disabled students in segregated classes is like sending them to the 'dungeon'; similarly, sending gifted students to segregated gifted classes is like sending them to the 'tower' (p. 28). These criticisms discussed above, on the one hand, challenge the claim that gifted education monopolies too much special education resources is an illusion made by Wu (1997). On the other hand, since gifted education has been regarded as one part of special education, these critical discourses are also corresponding to the concern of some researchers that special and gifted education has been a mechanism for the reproduction of educational and social inequality (e.g. Borland, 2003; Carrier, 1986; Chang, 2007; Sapon-Shevin, 1993, 1994 & 2003; Tomlinson, 1982). Put simply, the legitimacy of a segregated group of gifted people taking advantage of resources seems to be rationalised continuously based on Taiwan's context.

### *The dilemmatic discourse*

As mentioned, eleven headteachers hold uncertain attitudes towards the idea of inclusion of gifted students and the primary school headteacher HT 6 is one of them. She expresses her opinion on the inclusion of gifted students in a dilemmatic manner,

...From a mother or a teacher's viewpoint, should we position this child or determine and choose his life route so early? In terms of cultivating societal elites, whether we offer them appropriate education at the most crucial time is important... In the future, they can be used by the nation or become elites in the society.

The junior high school headteacher HT 10 also thinks that it is a dilemma to include gifted students in mainstream classes. She indicates that extra teachers or advanced curriculum should be offered to gifted students, otherwise, they are like 'students with learning disabilities' in mainstream classes and 'they are merely wasting their time there'. If more resources are ladled into gifted classes as she recommended, however, this will also cause concern about equity and fairness, as discussed previously.

In addition to these three discourses, the private junior high school headteacher HT 12 compares the difficulty of implementing inclusion on disabled and gifted groups. Highlighting the issue of classroom management, he points out that inclusion of gifted students is easier than inclusion of disabled students because

...their [gifted students'] disturbance is less when teachers are teaching. Maybe they may feel bored if some subjects are too easy for them. But at least, these students won't show disruptive or disturbing behaviours like those autistic children do.

## **INFLUENTIAL FACTORS ON HEADTEACHERS' VIEWS**

### **Understanding of Gifted Students**

#### *The functionalist perspectives*

Headteachers HTs 4, 11, 18 and 28 hold the view that giftedness stems from innate abilities. This is the same as the way they understand disability discussed in the previous chapter. This essentialist views on gifted students highly relies on IQ or achievement test results. As discussed in the previous chapter, some headteachers think that students who are identified and assessed by the Identification, Placement and Guidance Committees (IPGCs) at LEAs are formally called students with SEN (e.g. HTs 2, 7, 8, 27) and gifted students are included. The special school headteacher HT 27, for example, clearly states,

It's all IPGC's task to do the identification work...We should respect the professionals and the professional identification.

Again, these headteachers' feedback supports the argument of Skrtic (1991) that society often assumes that the professions' specialised knowledge is useful and adequate. This bureaucratic and expedient way of understanding gifted students allows them to rely on the government's standard. As such, headteachers can respond to their clients more efficiently and effectively. IQ and achievement tests and national competitions are used as main techniques to identifying gifted students. These all demonstrate that the essentialist perspectives not only have a strong impact on the legislation of the Act (TMOE, 2004) and the identification standard (TMOE, 2006) but also on these headteachers' understanding of gifted students. Because the junior high school headteacher HT 8 used to work in an LEA education department, she had been involved in the identification and assessment of gifted students. Although she claims that the IPGCs of LEAs can help identifying and assessing gifted students, she criticises and challenges the credibility of their identification work. She

indicates that the government puts too much emphasis on the intelligence testing result and it is merely one standard of identification.

Giftedness is often looked favourably on the grounds that higher ability which may make a contribution to many aspects of society. Although some researchers have been argued that giftedness is a socially constructed concept rather than a concrete object or material, some headteachers remain to take the materialist perspective explicitly to understand gifted students. This perspective is linked with the functionalist perspective because students' giftedness and talents are regarded as concrete objects, materials or national assets and resources. In order to manage and utilise these materials more efficiently and effectively, identification of gifted students with tests is important. The primary school headteacher HT 2 claims that if a nation wants to be strong and powerful, having gifted human resources and manpower is crucial. Thus, cultivating gifted students becomes significant and essential.

The primary school headteachers HT 4 and HT 6, for instance, think that it will be a waste if we cannot let gifted students to make contribution to society as soon as possible. The junior high school HT 7 thinks that gifted students will be future elites in a nation so they need better education. Education for these future elites is regarded as worthy investment because they are believed to make the nation wealthier and improve the entire society in all aspects. These headteachers' feedback not only corresponds with the government's gifted education policy (TMOE, 2008) but also helps in unmasking ideologies of the government. This gifted students as national asset discourse and ideology not only continue to influence the entire education system as well as members within this system, but are also being imposed and assimilated in the entire society. Applying Tomlinson's criticism (1982), gifted education is merely another type of special education which rationalises the vested interest position. With the help of the dichotomised gifted education and special education systems, the classes of elite/non-elite groups and the national-capital/non-national-capital groups continue to be reproduced and rationalised by those with power.

### *The critical perspectives*

Headteachers who take this perspective tend to think that giftedness not only stems from innate abilities but also can be nurtured. This giftedness or high ability should also be continuously practised in order to maintain it. Whether or not these headteachers have experience of working with gifted students, they agree that gifted students' high abilities not

only stem from their innate abilities, but can be trained and should be maintained by continuous work and practice. These headteachers include those with experience of working with gifted students (e.g. HT 6, 25, 27) and those without (e.g. HT 21). The primary school headteacher HT 6 uses her school (famous for its music talented classes) as an example and indicates,

...Let's be very honest, is it possible for a musician to learn music from fifteen years old to be a top musician? I think it is impossible. Do we need to cultivate some top elites for the society and the nation? I think we do need to.

Therefore, the senior vocational school headteacher HT 19 takes music talented students as an example and uses a doubtful tone to address his views on gifted students.

Some children still read and follow music scores when playing musical instruments, but some don't. Some can learn and master how to play one tune within one week, but some may take a month...So, are they really so gifted? I don't think so'

In addition to these headteachers' social constructionist perspectives on gifted students, the special school headteacher HT 25 further says that these students may be lonely and marginalised at school. They may seem to enjoy some privileges at school but they also have very few interpersonal interactions with others. Her notion reveals two facts. First, gifted students do enjoy privileged status or resources at school. This raises the problem of privileged class which has been discussed previously. Second, gifted students may suffer from the negative effects of social marginalisation. Giftedness may be a type of desirable difference but this difference can also be a negative label. Like the label of disability, this may lead to social marginalisation.

### **Other Personal Factors**

In addition to headteachers' personal understanding of inclusion of gifted students, factors such as gender, age, seniority of working experience and seniority of being a headteacher may also have influence on their views on inclusion. Firstly, seven male headteachers hold favourable attitudes towards inclusion of gifted students and seven hold uncertain attitudes (see Table 6.1 below). For female headteachers, six of out of ten hold favourable attitudes towards inclusion of gifted students. Comparatively, female headteachers are more supportive of inclusion of gifted students.

Table 6.1 Views on inclusion of gifted and talented students (compared by gender)

Gender	Favourable	Uncertain	Unfavourable	Total
Male	7	7	1	15
Female	6	4	0	10

Secondly, a larger group of headteachers (fifteen out of twenty five) in this research are in their 50s (see Table 6.2). The attitudes towards inclusion of gifted students of these fifteen headteachers are divided between the favourable and uncertain options. Very similar to the group of the headteachers in their 50s, attitudes towards inclusion of gifted students of headteachers in their 40s are also divided between the two options. The special school headteacher HT 25 is the only interviewee whose age is the younger than forty. She used to be a teacher of gifted resource class teacher and she favours the idea of inclusion of gifted students.

Table 6.2 Views on inclusion of gifted and talented students (compared by age)

Age	Favourable	Uncertain	Unfavourable	Total
51-60	7	7	1	15
41-50	5	4	0	9
<40	1	0	0	1

Note: The average of the twenty five headteachers' age is 51.76.

Thirdly, the majority of headteachers' (twenty out of twenty five) had working experience of more than twenty years, according to Table 6.3. Their attitudes towards inclusion of gifted students are divided between the favourable and uncertain options. Comparatively, only one from this group holds an unfavourable attitude towards inclusion of gifted students. This result cannot demonstrate the influence of working experience on headteachers' views on inclusion of gifted students.

Table 6.3 Views on inclusion of gifted and talented students (compared by seniority of working experience)

Years	Favourable	Uncertain	Unfavourable	Total
1-20	3	2	0	5
21-40	10	9	1	20

Note: The average of the twenty five headteachers' seniority of working experience is 27.9 years.

Fourthly, attitudes of the larger group of headteachers who have been in their post for less than ten years (Group A in Table 6.4) are divided between the favourable and uncertain options. For those headteachers who have been in their post for more than ten years (Group B), the result shows that five out of nine headteachers hold uncertain attitudes towards inclusion of gifted students. In other words, it seems that the longer the headteachers in their posts, the more uncertain attitudes towards inclusion of gifted students they hold.



Table 6.4 Views on inclusion of gifted and talented students (compared by seniority of being a headteacher)

Group	Years of being a headteacher	Favourable	Uncertain	Unfavourable	Total
A	1-10	10	6	0	16
B	11-20	3	5	1	9

Note: The average of the twenty five headteachers' seniority of being a headteacher is 8.3 years.

## Social and Other factors

### *Type, level and location of school*

According to Table 6.5, there are more headteachers (ten out of twenty five) holding uncertain attitudes towards inclusion of gifted students in mainstream schools. For special education headteachers, five out six of them are favourable to this idea. Although this result cannot be generalised due to the small numbers, it still implicitly demonstrates that special school headteachers seem to hold more positive views on the inclusion of gifted students than mainstream school headteachers in this research.

Table 6.5 Views on inclusion of gifted and talented students (compared by type of school 1)

Type of school	Favourable	Uncertain	Unfavourable	Total
Mainstream	8	10	1	19
Special	5	1	0	6

The number of public school headteachers is larger than private school headteachers both in Taiwan's real education context and in this research. For public school headteachers, Table 6.6 shows that ten out nineteen headteachers hold favourable attitudes towards gifted students. As for private school headteachers, there is no particular attitudinal tendency can be found due to the small number of participants.

Table 6.6 Views on inclusion of gifted and talented students (Compared by type of school 2)

Type of school	Favourable	Uncertain	Unfavourable	Total
Public	10	8	1	19
Private	3	3	0	6

Table 6.7 compares headteachers' views on inclusion of gifted students based on level of school. Owing to the small number of the interviewees, the influence of level of school on headteachers' views on inclusion of gifted students cannot be found. In primary level, three headteachers are favourable of inclusion of gifted student and three are uncertain about this idea. In secondary level, eight headteachers hold the uncertain attitudes towards inclusion of gifted students and five are favourable to this idea.

Table 6.7 Views on inclusion of gifted and talented students (compared by level of school)

Level of school	Favourable	Uncertain	Unfavourable	Total
Primary (aged 6-11)	3	3	0	6
Secondary (aged 12-17)	5	8	1	13
Junior high (aged 12-14)	3	2	0	5
Senior high (aged 15-17)	0	3	0	3
Senior vocational (aged 15-17)	2	2	1	5

The senior high level, however, is an interesting case. Only three senior high school headteachers join this research but all of them hold uncertain attitudes towards inclusion of gifted student. One of the interviewees, the headteacher HT 14 addresses her opinion,

I think it is better to have non-segregated gifted education programme in primary and junior high levels. Why? If it is segregated, it is easy to be labelled and students have more pressure... However, when in senior high school, students are more mature. If we have specialised class for them, they can learn more efficiently and there is more accountability in teaching.

Besides the influence of type and level of school on headteachers' views on inclusion of gifted students, the senior vocational school headteacher HT 22, the one who holds the unfavourable attitude, reveals his concern about this idea of inclusion based on his school's social and geographical context,

I think it's not good to do it in this area. If the gifted student always gets high scores in exams so easily but others always get lower scores, this student will be isolated. The discrepancy of the students and other students is too huge.

Fifty percent of students in HT 22's school are indigenous students and it is located in a rural area of Eastern Taiwan, according to Table 4.3 of Chapter Four. This is a comparatively more socially-disadvantaged area than cities. His comment reflects that gifted students in this disadvantaged area are so rare that they may become another disadvantaged group like the disabled group, and they may find it difficult to be included in mainstream settings even although they have high ability.

### *Identification of gifted students and quantity control of gifted class*

As discussed in Chapter Two, gifted education provision is offered in two forms: resource class and segregated gifted education class. Gifted students in the former type of provision are basically placed in mainstream classes but they are pulled out to receive extra training or teaching for some time. The latter type of provision is offered in segregated classes. The primary school headteacher HT 1 does not show his attitude toward the continuing role of segregated gifted education class. However, he points out that quantity control of gifted class can affect the process of inclusion of gifted students. He claims, '... when it is called a

“class”, the government must try to squeeze students out to fit in this class’. This comment reveals the hidden purpose of identification of gifted students. His feedback implies that it is questionable whether the purpose of identification is to identify students who need additional educational support or to produce students to be fitted in classes bureaucratically. The junior high school headteacher HT 8 further comments on the identification of gifted students based on her previous working experience in one LEA in an implicit and embellished way,

...I can't say too much on this issue. Why? Because the task of identifying gifted students has not been done properly in this county... Seriously, there are some problems in the process of identification... This is involved in many issues regarding policies... it may damage the image of this county... Sometimes, these gifted students are not really gifted and talented... I think you have read many newspapers in Taiwan... In every identification procedure, doubts from parents and the public always exist.

Her comment implicitly reflects Borland's (1996) contention that gifted education seems to be 'a well-financed leviathan that has effectively silenced criticism of its tenets and practices' (p. 134). In order to gain more insights into the problem regarding identification of gifted students, I follow her recommendation to review some reports on gifted student identification on newspapers. According to some media and newspaper reports, the credibility of identification of gifted students is highly questionable. For example, it has been suspected by parents that the identification of music gifted students is a 'black-box' task because it focuses more on the result of students' aptitude tests than their musical talent performance (Liu, 2009). Another report indicates that many cram schools in Taiwan target at the market of cramming intelligence tests in order to help students pass the requirement of intelligence to gain seats in gifted classes (Chang, 2008). Some headteachers, such as HT 3, 8, 11, 29 and 30 all point out that there can be a type of gifted students, called 'fake gifted students', present in gifted classes. The two headteachers' feedback and newspaper reports also imply that in order to maintain and control the existence and number of gifted classes, the educational authorities have to continuously identify gifted students and channel them into segregated gifted programmes or classes. Even though there is plea for inclusion and there are continuous doubts about identification of gifted students, it seems that there is no end to the production of gifted students.

### *Competitive credentialism*

The private junior high school headteacher HT 12 remarks that competitive credentialism has an impact on gifted students and this also has an effect on their views on inclusion. He

continues to comment:

If we don't have credentialism, the influence [on inclusion] can be less because parents won't overemphasise which degree their children obtain.

Another private junior high school headteacher HT 11 maintains that if there is no pressure of credentialism, all segregated gifted classes can be abolished. She straightforwardly criticises that 'these classes are merely products of credentialism'. The two headteachers' criticisms reveal the biggest problem of establishing gifted classes in Taiwan: competitive credentialism. Having this competitive ideology, parents always wish their children to be differentiated from and not to be included in a non-competitive and regular learning environment. The segregated gifted class is the best place to go. This competitive ideology not only affects parents and the entire society, as discussed in Chapter Two, but also affects teachers and school managers. Teachers may be under tremendous pressure to enhance students' academic performance. Under this pressure, they are understandably reluctant to implement inclusion. Combined with effects from parents and teachers and pressure of recruiting excellent students, the school manager's willingness to implement inclusion is influenced as well.

## **VIEWS ON SEGREGATED GIFTED CLASSES**

### **Overall Views**

Analysis of the twenty five interviews shows that fourteen headteachers hold favourable attitudes toward the continuing role of segregated gifted class, three hold uncertain attitudes (HT 1, 3 and 7) and eight hold unfavourable attitudes (HT 2, 8, 10, 11, 19, 25, 28 and 29). The existence of segregated gifted classes in schools is a fact. Interestingly however, the junior high school headteacher HT 7 indicates that 'currently, gifted students are not gathered in one class'.

### **Influential Factors**

#### *Demand of national development and students' and parents' needs*

Headteachers who are in favour of the continuing role of segregated gifted class mainly have three considerations: the demand of national development and students' and parents' needs.

The special school headteacher HT 27 suggests that the establishment of segregated gifted education classes is a demand and this demand may be from the student's individual difference, the parents and the society status quo. In terms the society status quo, she indicates,

Don't we all hope that Taiwan takes the leading role in technology in the world? ...If we have some gifted students to make our technology development progress and promote Taiwan to the international stage, isn't it nice?

The primary school headteacher HT 2 is consistent with HT 27's comment and she thinks that if a nation wants to be powerful and strong, offering excellent education for these gifted students is essential.

The senior high school headteacher HT 18 bases his argument on students' individual needs and indicates that '...because these students have the needs. They need to learn more'. He further explains that segregated gifted classes are necessary because they may not receive proper education owing to the large number of one class. In addition to demand of the nation and children themselves, parental demand also makes contribution to the continuous establishment of gifted classes. The senior vocational school headteacher HT 21 points out:

I think there is demand there. Do you know what I mean? Parents have the demand.... Also, the gifted education system has been well established already.

### *Fairness*

The junior high school headteacher HT 8 takes a stand on the principle of fairness and equality to criticise the establishment of segregated gifted class. She disagrees with the idea of segregated gifted class and indicates,

I don't agree... I feel everyone child is born to be equal and fair. If you put them in one class, the teacher quality will be better. The facilities and resources will be better as well.

HT 8's comment is concurred with the privileged class discourse analysed previously. Although the junior high school headteacher HT 10 is uncertain about the efficacy of the inclusion of gifted students in mainstream classes, she shows her unfavourable attitudes towards segregated gifted class. She criticises,

A gifted student may be exceptionally excellent in one aspect but this doesn't mean that he is excellent in all aspects. So, why should we give them a separate class? This is just unfair.

### *Competitive credentialism and conflict between the central and local governments*

The Ministry of Education of the central government does not encourage the establishment of segregated educational settings, as the junior high school headteacher HT 7 has indicated. However, there are no laws for prohibiting the establishment of gifted classes. Meanwhile, the Ministry of Education encourages and emphasises the development of gifted education and the influence of competitive credentialistic ideology on gifted education is discouraged. However, the importance of inclusion of gifted students has not been stressed by the government's education policy (TMOE, 2008). This unclear stance of the central government leads to the continuing establishment of segregated gifted classes at local governmental level. Again, following the junior high school headteacher HT 8's feedback, I review some media reports to offer a more complete picture on this issue.

According to Chang (2006) and Liu (2006), several schools cooperated to hold a large-scale joint paper-and-pen junior high school gifted class entrance exam to select gifted students in one county in 2006. This attracted more than 20,000 students to participate in this exam and it was fiercely criticised by the public and the Ministry of Education. This was criticised as a way of finding a loophole in the Act of Special Education to establish segregated gifted classes. According to Chang's (2006) report, this was fiercely lashed out by the National Teachers' Association that this was merely a restoration of ability-differentiation exam for differentiating and classifying students and fitting them into different classes in different form. This event not only uncovered the problem of identifying gifted students, but also revealed the conflict between the Ministry of Education at central government level and the LEAs at the local government level. Ostensibly the Ministry of Education did not encourage segregated gifted classes but neither did it prohibit them. In order to satisfy parents' needs, the LEAs allowed schools to run the risk of violating the law and developed their own ways to recruit gifted students. The junior high school headteacher HT 8 gives her opinion on the establishment of segregated gifted classes:

Why is every junior high school so keen on establishing music, art and dancing gifted classes? The prerequisite is the pressure of competitive credentialism...

Synthesising these headteachers' feedback with media reports, the conflict between the central and local governments seems to facilitate the continuing existence of segregated educational classes. Competitive credentialism seems to act as the most powerful catalyst to maintain and accelerate the establishment of segregated gifted classes. It was the crucial

event happened in 2006 that the Ministry of Education had revised the Act of Special Education in 2009. The latest Act has stated clearly that segregated gifted classes only exist in senior high school level (TMOE, 2009). However, having this legislation is not to claim that influence of competitive credentialism can be completely reduced and inclusion of gifted students and other students with different abilities can be easily achieved. This requires more follow-up advanced investigation.

## **SUMMARY**

Analysing of the twenty five headteacher interviews reveals that they have no consensual views on inclusion of gifted students and on the continuing role of segregated gifted class. There are three major discourses regarding inclusion of gifted students: the school as a microcosm of society discourse, the privileged class discourse and the dilemmatic discourse. The first two discourses are articulated by headteachers who hold favourable attitudes towards inclusion of gifted students whilst the third discourse is articulated by those holding uncertain attitudes. These discourses are influenced by factors such as headteachers' understanding of gifted students, gender, age, seniority of working experience and seniority of being a headteacher, type and level and location of school, identification of gifted students and quantity control of gifted class, competitive credentialism. Headteacher views on inclusion of gifted students are also strongly linked with their views on segregated gifted classes. Analysis of the interviews shows that demand of national development and students' and parents' needs, competitive credentialism and conflict between the central and local governments and fairness are factors influencing headteachers' views on segregated gifted classes. Headteachers who are affected by the first two factors are more likely to support the continuing role of segregated gifted class whilst those who are affected by the third factor are less like to support the continuing role of segregated gifted classes.

# **CHAPTER SEVEN**

## **THE IMPLEMENTATION OF INCLUSION IN TAIWAN: TWO CASE STUDIES**

### **INTRODUCTION**

It is difficult to find a consensus on the operational definition of inclusion so various practices may be possibly described as inclusive. After analysing headteachers' views on inclusion in the previous two chapters, this chapter turns to demonstrate how inclusion is implemented in Taiwan. Given the lack of a clear definition of inclusion and inclusive policy, one mainstream and one special school which officially claim to implement inclusive practice have been specifically chosen as case studies in this chapter. According to Wu (2007), the inclusive practice of School A is called the affiliated inclusive model and the inclusive practice of School B is the reverse inclusive model (see also Chapter Three). The two schools' websites and their inclusive programme websites, media reports on the two inclusive programmes and the two headteachers' interviews are three major sources for analysis. The affiliated inclusive model of School A is discussed in the first section and the reverse inclusion model of School B is discussed in the second section. The third section not only compares the two inclusive models but also presents further critique on the two models.

### **SCHOOL A: THE AFFILIATED INCLUSIVE MODEL**

#### **The Inclusive Programme and the Headteacher**

School A is a university-affiliated experimental primary school located in a city centre. This type of school has a strong connection with its affiliated university's department of education and it often plays a modelling role in the Taiwanese educational context. Another university-affiliated primary school headteacher HT 1 who is also a university professor indicates that the function of this type of school is to implement some educational experimental schemes and to offer internship opportunities for undergraduate students or student teachers. The headteacher of this type of school is often being held as a concurrent post by a university professor. However, the headteacher HT 2 of School A is an exception because she was selected through the standard procedure of headteacher examination. School A has two campuses, one is the main campus and the other is called the inclusive campus. According to



HT 2's description, it takes about one hundred million New Taiwan Dollars<sup>32</sup> to establish this inclusive campus and buildings and facilities are modern and luxurious. Due to limited central and local governmental budgets, it is rare to find swimming pools in public schools. This campus, however, has its own swimming pool, library, kitchen, toy and language therapy classroom, psychological therapy classroom and art therapy classroom. Although this campus is called inclusive campus, the governmental expenditure on this campus is almost as high as establishing a special school. HT 2 says that she is responsible for all administrative and management work, including teacher recruitment and school building maintenance and others, for the two campuses. A professor from the affiliated university and twelve teachers are responsible for the curriculum design and developing admission assessments for the inclusive campus. There are only six classrooms in this campus and the number of students is under a hundred and fifty. It is the professor who initiated this programme. HT 2 briefly describes the history of this inclusive programme,

...There was no inclusive campus in this school originally...it was about ten years ago that this inclusive programme started...it was a programme under one Foundation...this programme changed its location from one school to another so these children were like nomadic people.

On the website of School A, information regarding its inclusive programme is sparse and it seems that the school plays a passive role in implementing inclusion. Instead, detailed information about this programme is described on the inclusive programme initiator's personal website. This website link is shown on the website of the affiliated university of School A as well. Although the concept of full inclusion is defined as 'the integration of students with disabilities in the general education classroom at all times regardless of the nature or severity of disability' according to the inclusive programme website (Wu, 2009), HT 2 indicates that pen-and-paper assessments and oral interviews are used to select and recruit students into this inclusive campus. Comparison of HT 2's response with the definition of full inclusion published on the inclusive programme website suggests that this selective method of recruiting students is different from the definition of inclusion because some students are excluded through the process of selection.

### *Admission to the inclusive campus*

According to HT 2, two different recruiting standards are employed for the two campuses of School A. Recruiting criteria of students for the main campus are the same as for other public

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<sup>32</sup> One pound can exchange about fifty to fifty five New Taiwan Dollars. The exchange rate fluctuates from time to time.

schools. These criteria are non-selective and no entrance exams are needed. Admission to the inclusive campus, however, is based on selection. According to its recruiting criteria published on the school website (also see Table 7.1), the selection of students for the inclusive campus is an extremely rigorous process. HT 2 further reveals more information on the selective methods,

The recruitment of students to the inclusive campus is based on examinations... Basically, there are twenty four students in one class. Eight are students with disabilities and sixteen are regular students. The two groups of students must take exams...if they can't meet the requirements, I won't recruit them...so if your IQ is too low, we won't recruit you in...What's more interesting is asking parents to complete a questionnaire. The questionnaire is about their understanding of inclusive education and the score is included in the recruitment standard. You must understand inclusive education. If you don't, we won't want you.

Table 7.1 Admission requirement of the inclusive campus

Items	Participants	Explanation
1. Intelligence assessment	Students	Undertaken individually
2. Ideal of inclusive education assessment	Parents	Parents take the assessment in person
3. Adaptive behaviour assessment	Students	Undertaken individually
4. Interview	Parents and students	Parents' willingness to cooperate with this programme

Admission standards:

(1) The intelligence assessment cannot be below -3.5 standard deviation of average norm.

(2) Calculation of scores: Ideal of inclusive education assessment (40%), adaptive behaviour assessment (30%) and interview (30%)

This feedback unveils inequality of this selective admission for students who attempt to enter the inclusive campus in terms of its conceptual and practical levels. Conceptually, inclusion is different from mainstreaming because the notion of mainstreaming 'selectively integrates exceptional students into such classrooms on a case-by-case basis, depending on the needs of each student and the demands of the regular education classes' (Murphy, 1996, p. 472; also see Chapter Three). This way of selecting students to fit into the inclusive programme is more like implementing mainstreaming in a segregated inclusive campus than implementing inclusion. Practically, only those who are winners in the admission exam of the inclusive campus can enrol in this programme. As far as those moderately or severely disabled students are concerned, they are more oppressed and disadvantaged groups. Rationally speaking, these students should be included as a priority in the inclusive campus because they are continuously excluded from mainstream settings. However, according to the admission requirement stated in Table 7.1, it is apparent that severely disabled students are more likely to be excluded from the inclusive campus owing to its rigorous selective criteria. During the interview, HT 2 further reveals how the assessments and exams are produced. She says,

Do you know who produce these exams and questionnaires? At least, they should consult me to

organise an exam committee because I am the headteacher, am I not? But it never happens and the exams and questionnaires are just being produced.

Owing to the limited time of interviewing, HT 2 not only does not explain why this selective method is used to recruit students but also does not explain who produces these assessments and questionnaires. Rationale and reasons for using selective methods to recruit students are not given on the website of the inclusive programme either. Her other comment, however, implicitly reveals why students should be selected into the inclusive campus. She says,

...After all, this [inclusive campus] is the only one in Taiwan...the chancellor of the university often tells me that the only thing which the university can present to others and compares with others is this inclusive campus.

Since this is a university-affiliated primary school, the university inevitably has influence on this programme. HT 2's feedback shows that the inclusive programme seems to be regarded as an important and unique product by the university. If this is the case, efficacy, accountability and performance of this inclusive programme will be taken into consideration. As discussed in Chapter Five, students' severity of disability may affect headteachers' views on inclusion because severely disabled students are thought to be more difficult to manage in mainstream settings. In terms of accountability and performance, severely disabled students may affect the implementation of inclusion. In other words, selecting more capable disabled students to implement inclusion is justified on the grounds that the performance of the inclusive campus can be more accountable.

### *The inclusive practice*

The inclusive campus is separate from the main campus so its inclusive practice is mainly implemented in the inclusive campus. HT 2 therefore criticises that 'There is no connection between these two campuses... they are two systems'. According to the admission information shown on the inclusive programme website, the ratio of disabled and non-disabled students of each class is one to two. There are about twenty four students in one class so eight of them are disabled students. Also, there are two teachers and one teaching assistant in each class. Multi-instruction is employed and it is a teaching model in which modified or simplified curriculum is delivered to disabled and the original curriculum is delivered to non-disabled students in the same class. Students with high and weak abilities accomplish one task together in the same group. In the learning process, cooperative learning between heterogeneous groups is emphasised.

## Managerial Dilemma

This independent campus not only causes HT 2's concern about the difficulties of leading and managing this programme but also gives rise to some ideological and practical conflicts between her thoughts and the Ministry of Education. For example, it has been argued that resource class plays a significant role in promoting inclusion in Taiwan (Hung, 2008). However, whether a resource class should be regarded as inclusion or integration practice has always been arguable. HT 2 hence expresses her opinion about the lack of a resource class in this type of school,

I come to this school after being a headteacher in another school for more than six years. I do think this type of school [the university-affiliated school] should have a resource class but there is none in my school. I ask the Ministry of Education why there is no resource class here and it responds to me that you have an inclusive campus already...

Her feedback has two implications. First, the Ministry of Education may have its monetary considerations so controlling the number of resource classes becomes an important issue despite the fact that resource classes have been seen by researchers as a means of promoting inclusion. Second, the educational practice within the inclusive campus may be flexible but its segregation from the main campus highlights the inflexibility of the connection between two campuses. For example, HT 2 comments critically,

I have some students who need special education services here in the main campus but I can't transfer them to the inclusive campus, isn't it weird? I am the head for the two campuses, am I not?

This feedback shows that students in the main campus cannot share resources and receive education from the inclusive campus. That is, the problem of resourcing is highlighted. Due to the inflexibility between two campuses, as a school leader and manager, she further reveals her feeling of this programme,

We also have to be responsible for the administration work of that inclusive campus. There is one special education coordinator there only...I need to lead all administrators to put our seals on official documents and being responsible for her [the programme director]... Our government cannot use this model to lead this kind of school... The two schools [campuses] and one is five kilometres away... you want me to separate my brain and manage these two campuses together.

Her description demonstrates that there is only one administrative staff member from the main campus available in the inclusive campus whilst most administrative staff are still in the main campus. Managing the administrative tasks between the two independent campuses

is difficult. Although HT 2 is in favour of the inclusion of disabled students, she seems to hold a negative view of this programme. She finds it difficult to exercise her full power to manage and lead this programme and she comments,

When I came to this school, all the staff in the main campus tried to brainwash me. They told me, 'Dear headteacher, any achievement in the inclusive campus has nothing to do with our school' ... (silence)... they try to let me know that just letting that campus go... but how can I separate the administration and the curriculum of the two campuses? ...They are entangled, aren't they? ...but if it [the inclusive programme] really can run well, why should I care how it runs?

Although other administrative staff members are not interviewed in this research, HT 2's response still reveals that this managerial dilemma seems to have occurred before the headteacher took up her post, and it may continue to be a long-term issue of this inclusive programme.

### **The Inclusive Education Foundation and Media**

This programme is also linked with a private organisation named the Inclusive Education Promotion Foundation. That is, this inclusive campus is related to two external institutions, including the national university and a private foundation, in addition to the main campus. According to the inclusive programme website, this Foundation also designs some occupational courses such as cooking training for disabled students. Students with and without disabilities can collaborate to produce some products such as dumplings and bread to sell. With the help of this course and under the name of this Foundation, one dumpling shop and one bakery are open in this campus and the products made by students can be sold. Owing to the uniqueness of this inclusive campus and the Foundation, this campus is usually on Taiwanese media reports, including TV news and newspaper and magazine reports. Therefore, these products are advertised on the media (Fang, 2009; Hung, 2009).

Contrasted with radical examination of mainstream education development and the school leader HT 2's own comments on this inclusive campus, critical examination of this inclusive campus seems to be missing in these reports and news. It is also interesting that no media seems to be interested in uncovering how students of this inclusive campus are selected. In a business magazine report, Wang (2009) uses 'an independent mainstream school' to describe the inclusive campus. In this report, he also points out that many parents working in the Science Park area are keen to enrol their children into this inclusive school. Science Park area in Taiwan is similar to the Silicon Valley of California in the USA. The majority of

people who work in this area are engineers and they tend to have high social status<sup>33</sup> and are more affluent. Via the discourse of media report, the ideal of inclusion seems to be assimilated and promoted. However, this media discourse also becomes a form of promotion for this inclusive campus. The report also seems to imply that families in the Science Park area are part of the targeted customers of the inclusive campus. On another media report written by Ching (2010), the inclusive programme director Wu claims that,

Inclusive education is to make disabled students study with non-disabled in the same classroom and it stresses offering disabled students a normal education environment but not a segregated environment.

As far as the inclusive campus is concerned, this definition is consistent with the practice implemented in the campus. As far as the entire School B is concerned, however, this inclusive campus with rigorous selective admission requirements seems to be a segregated institution affiliated to School B. This then is contradicted by Wu's claim.

## **SCHOOL B: THE REVERSE INCLUSION MODEL**

### **The Inclusive Programme and the Headteacher**

School B is a national residential special school located in a small town. According to the headteacher HT 25, the word 'Benevolent' of the school's name has been used for many years. According to Table 4.3, HT 25 is a comparatively young (aged thirty nine) female novice leader who used to work as a resource class teacher, gifted class teacher and officer in the government education sector. She cannot explain in detail why this school was renamed as Experimental School in the interview session but she tries to give her own explanation. 'Maybe we just name it imprudently but we do recruit students without disabilities since 2005', she says. The school was renamed in 2005 and the word 'Benevolent' had been removed since then. After that, this school started to recruit non-disabled students. In other words, this school was entirely a special school for disabled students only before 2005. HT 25 is one of the interviewees who find it difficult to make the time to be interviewed. She told me that this interview was her third meeting in one day. This interview was scheduled in the late afternoon after her meeting at the Ministry of Education in the morning and another meeting with the director of a parental association of disabled students. This is evident of the significant and influential role of this headteacher.

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<sup>33</sup> According to the study of Fwu & Wang (2002), engineer has being ranked at the seventh within the top ten high social status positions in Taiwan.

There are seven hundred and forty five students in this school and thirty nine percent of them are students with disabilities now. There are forty classes in total, including nine mainstream classes, four inclusive classes and twenty seven special classes. Similar to School A, HT 25 indicates that this school also plays a passive role in implementing the inclusive programme. Because of the demands and pleas of community residents to the Ministry of Education for a senior high school in this area, the school has to start recruiting mainstream students. Taking into consideration education budgets, the Ministry of Education has drawn up a strategic plan by using the excellent facilities of School B as a base and aims to transform it and recruit non-disabled students. The special school headteacher HT 29, however, indicates that the recruitment of non-disabled students is political. He says,

To be very honest, I am unashamed to say that the senior high school has been set up for political reasons... That's because it was the previous country councillor's promise. He promised to set up a senior high school there at that time but he didn't make it. As such, this is a solution.

Like other national special schools, facilities of School B are well-equipped and buildings are specially designed for disabled students. It has one rehabilitation building with a swimming pool. Besides, there is one independent building specially built for senior high students without disabilities. Although recruiting non-disabled students into this school is a result of negotiation between the Ministry of Education and the parental and community group, the headteacher HT 25 plays the key role in this work. HT 25 points out that School B plays a passive role in implementing inclusion. She firstly talks about the placement inclusion,

...the so-called placement inclusion means that we have more regular senior high students now...and if you ask me whether this is an inclusive school? I will tell you, "Yes, this is absolutely an inclusive school." Because we have more interactions with students with special needs on activities, teaching and life routines this year.

According to her feedback, she coins one term to describe the inclusive practice exclusively implemented in this school. It is called the 'dual-axis inclusion', which refers to inclusion of disabled and non-disabled students together in a special school. This model allows non-disabled students of the senior high level and other disabled students to work both independently and sometimes cooperatively. She exemplifies how inclusion is implemented at school,

I create a 'family system' and maybe you can see some pictures on our school website. That is, I divide all students in my school into sixty eight families randomly so one family may include special needs students from primary, junior high and senior high levels and some from senior vocational level. In

other words, a family may include every kind of students and it's roughly about ten students in each family...we have a thematic activity every month...For example, the family members can perform in the school's induction day ceremony. And, we have birthday celebration every month. We regard every family as one unit and allocate a classroom for every family to celebrate it...In the beginning, it's a bit awkward. After several months, it becomes more and more natural.

Besides creating the family system and enhancing staff communication for the whole school, she also encourages teachers to do more inclusive practice in some non-academic classes such as art and physical education classes. These classes are less influenced by credentialism and pressure of academic attainment so inclusion in non-academic classes is encouraged.

### *Recruiting non-disabled students and the inclusive practice*

According to the website of School B, it not only recruits non-disabled students at senior high department within the school but also recruits students to join the inclusive physical education class. As far as the former is concerned, the admission of these students is based on the National Basic Competence Exam (also see Chapter Two). That is, students of the senior high department of School B are selected based on results of academic performance. As far as the later is concerned, there are only three classes at the senior high level. Each class includes disabled and non-disabled students. Taking the Year 2010 admission announcement as an example, School B intends to recruit thirty students in this class, including two disabled students and twenty eight non-disabled students. Although academic tests are not required for admission to the inclusive physical education class, excellent physical education performance and potential are required. Taking one requirement as an example, it states on the admission announcement that the student who gains one of the first eight prizes of the national physical education competition or national physical education for the disabled can be recruited. In other words, admission of non-disabled students and students in the inclusive physical education class relies on selection. According to HT 25's feedback, sixty one percent of students in School B are non-disabled students so she regards this school as an inclusive school. She says that when students with SEN are like normal students in having same opportunities to learn and grow in mainstream schools, this can be called inclusion. She further comments the way of recruiting non-disabled students into special schools,

Take special schools as examples: although they include some non-disabled students in and mix them with disabled students and say that this is inclusion, I really don't think so.



Her comment is interesting because School B itself is a special school. When she criticises this programme, she seems to forget School B is one of these special schools.

### **Dealing with Concerns of Staff and Parents**

Echoing HT 2's feedback discussed in the previous section, HT 25 also found that leading and managing this type of school was the most difficult task for her when she came to the school. She indicates that the school used to be a special school but now there are more and more students without disabilities enrolling in. as such, management of the school is more difficult and the special education oriented and dominated administrative system therefore has to be reconstructed. She comments,

I feel that we shouldn't divide students' affairs into the special education division and the senior high school division...I hope every administrative staff can, like me, think about both sides. I feel like I have to lead them to do it because they have not received this kind of training before.

The recruitment of non-disabled students causes concerns for the staff members who have not worked with non-disabled students before. HT 25 says that senior teachers who have worked in this school for many years may worry about the dispersal of resources allocated for the special education department. However, teachers working with non-disabled students are included in the system. According to HT 25's feedback, these senior teachers may fear the loss of their original status in this school. Senior teachers who have worked with disabled students for many years used to be main focus of the entire administrative system of this school. Recruiting non-disabled students into this school also causes concerns for parents with disabled children. According to HT 25, they are worried about the diminishing power of the special education department within this school. She reveals that '...they [parents] can't react against the placement of non-disabled students into this school so they hope to maintain something which can't be changed at least'. These things may include facilities and subsidies and even the name of the school. Although HT 25 claims that this is an inclusive school, she is reluctant to change its name. First, it is involved in complicated legal process. Second, changing the name of this school from experimental school to inclusive school may make parents worry that support and funding for disabled students may be decreased if the school is continually transformed into a more non-disabled student dominated school. Her feedback strengthens the claim made by Riddell (2002, p.47),

... because inclusion is often associated with a rejection of individually targeted funding, some parents have become suspicious that inclusion may in reality lead to a reduction in the amount of money spent on disabled children.

## **Promoting Inclusive Education by Media**

The headteacher HT 25 not only promotes inclusion within the school but also emphasises out-of-school connections with the help of media. She indicates, 'We will do some propaganda to some people concerned by using the promotion of media'. These media includes different newspaper reports and one local Taiwanese TV channel. Media reports regarding the school and its inclusive practice are published on the school website as well as HT 25's personal blog<sup>34</sup>. According to a newspaper report written by Tang (2009), for instance, the senior high department of School B performs well in the National College Exam. This good performance functions as a promotion for this school and can attract more non-disabled students to enrol in this school. Moreover, this may attract other people's attention and some funding with the help of media. She further points out,

There are some invisible things in the school organisation, including the parent committee and some consultants. We recruit them to be consultants in our school because they fund us... if I hope the special education division moving to inclusion, besides staff in this school, people who are related should accept that this school has some special needs students.

HT 25 does play a key and active role advocating inclusion within and out of the school and she also tries to involve the community residents in this process. She terms this as community inclusion. Since this school is transformed from a national special school, HT 25 also tries to promote its special education department in the media. For instance, according to a newspaper report (Tsai, 2010), twenty three students of School B were awarded gold medals in the National Sports Competition for the Disabled. This report implicitly demonstrates accountability and educational performance of this school. Moreover, the second inclusive sport competition has been held for all students and staff of School B and this was on the news report, according to Chen (2010). In other words, the headteacher not only promotes education for the disabled students but also for the non-disabled students as well as its inclusive practice via the media.

## **FURTHER CRITIQUE OF THE TWO INCLUSIVE MODELS**

Before presenting further critique of the two inclusive models, it is essential to compare them with the government's policy on inclusion. As discussed in Chapter Two, the only official document regarding inclusive education is the Report on Education for Individuals with

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<sup>34</sup> A blog is a type of website or part of website.

Disabilities (TMOE, 1995). The governmental policy report states clearly that inclusion is to 'let students with disabilities...to transfer from a special school to a mainstream school, enter a mainstream class from a special class (p. 31). However, the implementation of the two inclusive models is different from the policy document. The reverse model of School B is completely opposite to the definition given on the policy document. Interestingly however, this policy document was produced by the government and the reverse inclusive model of School B was promoted by the government as well. According to interviews with another national special school headteachers HT 26 and HT 27, their schools also implement the reverse inclusive model. This clearly shows the discrepancy between the government's policy and practice regarding inclusion.

### **Selection, Segregation and Inequality**

#### *Selectively inclusive education and inequality*

The ideal of inclusion and inclusive practice of the two schools may be promoted and advocated with the help of media but this gives a rise to another concern, which is the advocacy of selection. Selective methods are applied to the two inclusive models to recruit students. Doing so can increase the accountability of the two government-funded inclusive models because severely disabled students have been excluded. Discussion of the selective method to recruit students into the two inclusive models is continually missing from media reports. Take School B for instance, however, the good performance of the National College Entrance is often reported in the local media. In order to maintain its good performance in national exams, enhancing students' academic competition ability becomes important. Admission to the senior high department of School B is also based on the National Basic Competence Exam. This means that students with better academic attainment and performance are selected whilst those with lower academic performance are excluded because of the National Basic Competence Exam. School A is another example to explain the issue of inequality of the affiliated inclusive model. Its rigorous admission requirement specifically designed for this experimental inclusive model clearly demonstrates the educational inequality of this inclusive model. What is even more unfair is that, among the eight disabled students in each class, children of the staff members of the affiliated university enjoy the prior privilege of being recruited into this inclusive campus, according to the admission announcement of this inclusive campus. Inclusion and inclusive education functions as a mechanism to promote equality and fair educational opportunities. Whether

this selection mechanism promotes educational equality and concurs with the philosophy of inclusion is questionable.

### *Segregation and inequality*

Although School A and B claim that inclusive practices have been implemented at school, visible segregation in their school campus and building exists, and also in their selection systems. As far as School A is concerned, the inclusive campus is completely separate from the main campus and the linkage between the two campuses is weak. As discussed previously, inclusive practice may be implemented within the inclusive campus but no inclusive practice is being implemented in the main campus. Furthermore, since the connection between the two campuses is weak, accessibility and flexibility of using resources of the inclusive campus is limited. This leads to the result that students of the inclusive campus have full legitimacy and the privilege of using the excellent facilities and resources such as the swimming pool, the library and others. Sharing resources becomes unnecessary.

### **Applicability of the Two Models**

The two inclusive models can be regarded as ‘a revolutionary departure from existing organisational structures and systems of service delivery in education’ (Murphy, 1996, p.469) because the implementation of the two inclusive models involves a radical reform of schooling in terms of its ‘curriculum, assessment, pedagogy and grouping of pupils’ (Mittler, 2000, p. 10). However, the two models also create different barriers and have influence on the comprehensive applicability and implementation of the two inclusive models in Taiwanese educational arenas. Firstly, the establishment of separate educational settings (e.g. the independent campus of School A and the segregated building of School B) is so expensive and difficult to maintain that the comprehensive implementation of the two models in Taiwan’s educational context is questionable. The establishment of the independent building for non-disabled senior high students in School B seems to be a political decision, according to another special school headteacher HT 29. He indicates,

That’s because it was the previous country councillor’s promise. He promised to set up a senior high school there at that time but he didn’t make it. As such, this is a solution.

In other words, the recruitment of non-disabled students in School B might not have occurred without the political decision. This decision was stimulated by community residents' demands and pleas. It is this unique situation that the independent building for senior high students has been built in School B. Moreover, although School B was an entirely special school, the ratio of disabled students has been decreased to thirty nine percent (also see Table 4.3) since non-disabled students have been recruited. However, the non-disabled senior high students study in one independent building most of the time and the majority of disabled students study in another building. Although the physical facilities such as barrier-free facilities within the school are excellent, the connection between the two divisions is still weak. Owing to its uniqueness, this model may not be applied to other special schools in other local areas.

Implementing inclusion with the help of selection is another issue which may be difficult to apply throughout the entire education system. Selection based on score or exams or tests can be seen as a mechanism running counter to full inclusion. Each selection always produces winners and losers and it decides who should be included and excluded. If selection is involved in the implementation of inclusion in the entire education system, more and more winners and losers will be produced. This implies that there will be more exclusion for these losers. So, the special education school headteacher HT 29 critically comments the government's educational experiments and highlights the very political nature of special education and inclusion,

We have many educational experiments but which one fails? ...As long as the experiment starts...it often continues for decades, sometimes, it may exist forever. In other words, the involvement of political power is significant but no one wants to touch this point...

The applicability and implementation of the affiliated inclusive model of School A in the entire Taiwanese education system is even more impossible. First, the implementation of this model must have a connection with university. Second, it must have its own campus. Third, students must be selected. Fourth, it must have linkage with a private foundation. Meeting the four requirements is impossible for any other schools in Taiwan when educational resources are so limited. Although the headteacher HT 2 supports the ideal of inclusion, she reveals the same concern as HT 29 has suggested previously. She says,

This educational experiment has been done so long...If this government has invested a large amount money in these two campuses, I mean, there should be a deadline for an experiment, shouldn't it? ...It seems, however, that there is no end for experiments.

Among the twenty five interviews, the primary school headteacher HT 5 was the only who actively told me that he had heard of School B. He also knew that inclusion had been implemented in this school. However, he indicated one very realistic issue which parents might be concerned about: that is the graduation certificate of School B. Because the Taiwanese society stresses credentialism, he was curious about what kind of graduation certificates did non-disabled students received from School B. I ask HT 25 this question and she answered, the name of the school on the certificate is National Experimental School B although this school is famous for its special education provision.

Table 7.2 A Comparison of the Policy and the Two Inclusive Programmes

TMOE (1995) claims in the special education document that ‘...resource classes....and least restrictive environment system, the practice is moving towards the spirit of inclusion...The antonym of inclusion is isolation. Isolation often make accommodation of students with disabilities to daily-changing social life more difficult. Simply, it means to let students with disabilities walk into a normal society from a specific institute, transfer from a special school to a mainstream school, enter a mainstream class from a special class. It also refers to mainstreaming and normalisation.’ (p. 31).		
Practice	School A	School B
Type of the school	Mainstream school	Special school
Nature of the school	National university-affiliated experimental school	National experimental school
Level of the school	Primary level	From pre-school to secondary level (including pre-school, primary, junior high, senior high division, senior vocational division and one physical education inclusive class)
Location	City centre	Town
The inclusive programme	Affiliated inclusive model (One professor is involved in the entire inclusive programme design)	Reverse inclusive model (This school includes non-disabled students in this special school.)
Admission of the inclusive programme	Selection (test and interview) Disabled and non-disabled students are selected based on rigorous admission criteria. They are included in inclusive classes and the ratio of disabled and non-disabled students is 1:2.	Selection (exam) (a) Students with and without disabilities are included in inclusive physical education classes. Although these students have physical disabilities, they have various sports talents or potential. (b) Non-disabled senior high students (aged 15-17) without disabilities are recruited to study in this special school.
No. of campus	Two (Including one inclusive campus)	One (But non-disabled senior high students are taught in a separate building)
No. of staff	101	185
No. of total students	1217	745
% of students with disabilities	5%	39%
% of students with giftedness and talents	9%	0%
No. of total classes	43	40
No. of segregated special classes	0	27
No. of segregated gifted classes	4 (Only in the main campus)	0
No. of inclusive classes	9 (Only in the inclusive campus)	4

## Discrepancy between Policy and Practice

Table 7.2 summarises and contrasts the inclusive models of the two national schools. A comparison of the two inclusive models and the government’s policy document shows that the inclusive practice is different from its definition. The Ministry of Education claims that

inclusion is to let disabled students transfer from special schools to mainstream schools (TMOE, 1995). However, School B does not transfer disabled students to mainstream schools. Although the name of School B has been changed from a special school to an experimental school and the headteacher HT 25 claims that this is an inclusive school, School B is still a special school. Students of the inclusive campus of School A are taught in mainstream classes but in a whole-school sense, the inclusive campus is isolated and separate from the main campus. Transferring disabled students from the inclusive campus to the main campus or *vice versa* is difficult, according to the headteacher HT 2's description. Gifted and talented students are not taken into consideration in the School A' inclusive campus and School B's inclusive model although these students are regarded as one category of students with SEN in Taiwan.

## SUMMARY

The two case studies not only demonstrate how inclusion is implemented in Taiwan but also show the discrepancy between the policy and real educational practice in the Taiwanese education context. The ratio of disabled and non-disabled students is controlled in the affiliated inclusive model in School A. The inclusive campus is a completely independent campus and has a weak connection with the main campus. Instead, it is strongly related to a private foundation established in the inclusive campus. The formulation of the reverse inclusion model of School B can be attributed to the community residents' demands for a senior high department. This reverse inclusion model may help change the image of segregation of special school but this model remains in contradiction with the definition of inclusion stated on the government's special education policy. This model has an influence on some national special schools in Taiwan and they are also starting to recruit non-disabled students. The two inclusive models are implemented differently in different types of school but relying on selective methods to recruit students is one key feature of the two models. The headteacher HT 2 holds a conservative view on the affiliated inclusive model of School A whilst HT 25 holds a more positive view on the reverse inclusion model of School B.

## **CHAPTER EIGHT**

### **CONCLUSION**

This qualitative research has sought to understand the way in which the inclusion of students with SEN is understood by headteachers, who may be regarded as having high social status in Taiwan. The study also attempted to identify various factors influencing these headteachers' views from a broader social perspective. In order to achieve this goal, the research began by analysing the broad social and cultural context of Taiwanese society, which combines Eastern Confucianism and Western capitalism. It is argued that Taiwan is a country influenced by authoritarianism, which is a common feature of both these traditions. It is also influenced by other features of the two ideologies. For instance, respecting authority, being neutral and harmonious and valuing education are features of Confucianism. Characteristics of capitalism include competition, producing capital and profits, stressing efficiency, calculability and predictability. Although Taiwan has gradually moved towards a more democratic and emancipated society, its entire society continues to be shaped by the two ideologies and it remains an oppressed society with a strong authoritarian tradition. In this social context people are less likely to challenge authority and taken-for-granted knowledge in many aspects, including the field of special education. Sociological discourse tends to be critical and it often has a discomfiting effect on the authorities. In order to introduce more diverse perspectives and challenge the dominant psycho-medical perspective in the field of special and inclusive education, a sociological approach has been adopted in this study. Further, this approach involves 'a positive involvement in social change, in influencing policy' (Lane, 1981, p. 9). In this final chapter, it is time to pull together the different themes of the argument advanced in this thesis and to consider the prospects for inclusive education development within Taiwan, which may be regarded as a Westernised Confucian society. I will begin by summarising the argument put forward in this thesis about the relationship between Confucianism, capitalism and issues regarding inclusion in Taiwan. Implications of this research are discussed in the final part of this chapter.

### **SUMMARY OF FINDINGS FROM EARLIER CHAPTERS**

#### **Special and Inclusive Policy and Practice in westernised Confucian Taiwan**



Chapter One highlighted that Western capitalism, Confucianism and the ancient Chinese examination system have tremendous influence on Taiwanese society and people. The additional influence of capitalism means that efficiency, accountability, calculability and predictability are also seen as very important. Making the education structure and systems within this structure run as smoothly and efficiently as possible has always been the primary consideration for educational bureaucrats of local and central governments. As such, some educational practices in Taiwan, including special and inclusive educational provisions, may be promoted and implemented based on the capitalist principles. By applying a sociological perspective in Chapter Three, this research has indicated that the government takes a more functionalist perspective in defining and efficiently identifying students with SEN. After identification, these students are offered segregated special and gifted education services. It has been believed that this segregation and differentiation is doing good for students with SEN. This has been a consensual view on the definition of SEN and this can also be understood as an ideology which is 'a set of beliefs or attitudes shared by members of a particular social group' (Bloor & Bloor, 2007, p. 10). In fact, not only educational bureaucrats and policymakers but also researchers all call for more scientific and systematic management in special and gifted education systems (Wu, 2007; Wu, et al., 2008). This managerialist and functionalist thinking, continued with the effect of capitalism, as I have discussed in Chapter Two and Three, has resulted in the stratification and bureaucratisation of the entire education structure. The education structure is divided into general and special education systems, special education being further divided into systems for disabled students and for gifted students. Special education systems have been described as 'a form of psychological reductionism' (Barton, 1998, p.78). This form of psychological reductionism also includes gifted education systems. In Taiwan, in order to maintain this stratified special/general/gifted education systems, disabled and gifted students have to be continuously selected to fit into the three systems. Although disabled students remain in the special education system, the other students identified as 'normal' or 'gifted' have to face continuous selection processes and competitions within the general and gifted education systems. On the one hand, this stratification is believed to improve the educational quality for the two groups of students with SEN. On the other hand, however, this stratification can be viewed as another form of segregation. The stratified education systems are believed to function and run seamlessly and smoothly. Therefore, under the influence of Confucian beliefs in collectivism, emphasising the stratification of education structure becomes a collectivist value. The prevalent view is that students with different abilities should be separated and education provision for them should be separated as well. In fact, structural

conflicts have emerged and persisted within and between systems and these conflicts may increase the speed of segregation between systems. It has been claimed, nevertheless, in the government's legislation and policy that all students are treated equally and they enjoy equal educational rights. Also, disabled and gifted students are all equally regarded as two sub-groups of students with SEN.

However, Chapter Two, using data from the government's legislation and policy documents, has clearly demonstrated that identification, categorisation, resources and educational provision for disabled and gifted students are different. As far as the issue of identification is concerned, there are differences not only in the procedures for identification of disabled and gifted students but also in the standards used for identification. Also, these identifications tend to strongly rely on test, IQ and academic attainment results. At the primary and secondary levels, the identification rate for disabled students is about 2.05% and 1.45% for gifted students. As far as the issue of categorisation is concerned, there are twelve categories of disabilities and six categories of giftedness and talents listed on the Act of Special Education (TMOE, 2004). Meanwhile, there are another two categories of giftedness listed in the gifted education white paper (TMOE, 2008). Cultural and social factors are taken into consideration to produce these two categories of giftedness, whilst these factors are not seen as relevant factors in considering students with disabilities. As far as placement of students with SEN is concerned, a large number of placements for students with SEN, including disabled and gifted students, are still in segregated educational settings. It has been shown in Chapter Two that the total percentage of disabled and gifted students in full time segregated and independent settings is 59.36%. This is higher than those who are placed in non-independent settings. It is because of this discrepancy within the government itself that this research supports the evidence produced by Hung (2001) that the Taiwanese government has no intention or motivation of implementing inclusion comprehensively. The fact that the government is unwilling to provide a clear definition of inclusion in official policy documents reinforces this view. Therefore, as argued in Chapter Three and Four, this research has adopted a critical stance to the analysis of Taiwanese special and inclusive education development in order to avoid following the traditional functionalist perspective on special education developments in Taiwan. Theorising special education is considered to be 'ineluctably political and provocative' (Slee, 1997, p. 416). In fact, understanding and analysing discourses of inclusion is ineluctably political and provocative as well. Definitions of inclusion have been quickly and efficiently reduced to synonyms of normalisation, mainstreaming or least restrictive environment. These definitions suggest that implementing

inclusion is about the assimilation and accommodation of disabled students into a normal environment, as discussed in Chapter Two. This contradicts other definitions of inclusion and this has always been a serious concern of some researchers (e.g. Ballard, 1995; Slee, 1997 & 1998; Barton, 1998 & 1999). For instance, Slee (1997) has indicated that 'terms such as special educational needs, integration, normalisation, mainstreaming, exceptional learners and inclusion (this list is not exhaustive) merge into a loose vocabulary variously applied to manage the issue of disability as it collides with the regular education system' (p. 412). In the highly functionalist, competitive and capitalist social climate of Taiwan, there is a need for efficiency in the management of disabled people's lives. As a result, 'inclusion is reduced to a technical problem of resourcing, management, social groupings and instructional design within this scenario' (Slee, 1997, p. 41).

### *Two inclusive models*

Inclusive practices of the two schools analysed in Chapter Seven provide examples. If an inclusive school is a microcosm of, and a pathway towards, a more inclusive and democratic society celebrating diversity, the exclusory and selective mechanisms of the two schools which I have analysed in Chapter Seven should not be applied to exclude disadvantaged groups out of the mainstream. As a matter of fact, the two practices can be merely seen as integration, not inclusion. This kind of reductionist view of inclusion will arguably make comprehensive implementation of inclusion more difficult because this reductionist view of inclusion fails to challenge the education system directly. In addition, the two inclusive models described in Chapter Seven are very expensive and admissions are highly selective. Furthermore, the two inclusive programmes have their own unique prerequisites and factors which may not be able to be applied to a wider range of schools. The comprehensive applicability of the two models is highly questionable.

### **Headteachers' Discourses of Inclusion**

Although the Taiwanese government has continuously claimed to tackle the problems of excessive academic competition, selection and examination and cramming, these capitalist elements persist in playing key roles in the entire education system. Owing to the large use of calculable and ostensibly neutral numbers provided by test and exam results, IQ and credentials, judging peoples' value based on these numbers has come to be seen as the most efficient and effective way. Making use of these human resources according to this taken-for-

granted assumption and ostensibly bias-free numbers has become acceptable in Taiwanese capitalist society. This phenomenon reflects the influence of credentialism and meritocracy on the entire education system, including special and gifted education. This also leads to the problem of segregation of people. Influenced by the Taiwanese unique historical, social and educational context discussed in Chapter One and Two, the discourses on inclusion of students with SEN articulated by Taiwanese headteachers are diverse. Their school policies and views on the inclusion of students with SEN are often influenced by the government's policies as well as various external powers such as parents. Owing to the unclear and incoherent definition of inclusion offered by the government's policy, confusion over the conceptual and operational definition amongst headteachers who are also school managers is understandable. This has been shown in Chapter Five and Six of this research. Contrasting the analysis in Chapter Two with that in Chapter Five and Six, this research has further suggested that the government and the majority of school headteachers in capitalist Taiwan tend to articulate their discourse on the inclusion of disabled students from a managerialist perspective. Within this discourse, inclusion in the Taiwanese context has been simplified in the interest of efficiency and redefined as integration, mainstreaming and normalisation. This finding reflects Slee's (1997) concern that critical scrutiny of special and inclusive education is necessary; otherwise, inclusive education may merely be reduced into the functionalist endeavour of assimilation. These terms cannot and should not be used interchangeably, and it is even more hazardous when this confusing and misleading definition is articulated and translated into practice in real educational arenas.

### *Similarities and differences in discourses of inclusion*

Taiwanese headteachers belong to an elite group with high social status and power in society and they are expected to offer more challenging and critical insights regarding education. In fact, however, not all of these experienced educational practitioners are willing to offer more critical perspectives on the government's special and inclusive policy and on practice and knowledge shaped by authorities or professionals individually. Influenced by Confucianism and discretion, they find that holding a neutral view on the inclusion of students with SEN is a more appropriate stance for them in their position. Under the influence of this ideology, people within this system value education highly and they are taught and encouraged to respect authority, be neutral and harmonious and stress collectivism. In the Taiwanese education system, the interactive influence of Confucianism and Western values makes people's judgement within this system become paradoxical. Taking education as an example,

on the one hand, individualised education, independent thinking and willingness to challenge authorities are encouraged. On the other hand, however, people are also encouraged to revere authorities and be neutral and follow collective consensus. Taiwanese headteachers' uncertain views on inclusion in this research can be understood as an interactive result influenced by capitalism and Confucianism, as well as other social groups, such as parents.

Chapter Five has shown that there are three major discourses surrounding the issue of inclusion of disabled students, including the managerialist discourse, the critical discourse and the school as a microcosm of society discourse. The most popular discourse is the school as a microcosm of society discourse, a discourse articulated by ten different headteachers. They think that school is a microcosm of society and disabled students will enter the society eventually so inclusion is needed for them. The second popular discourse is the managerialist discourse articulated by eight headteachers. This group may support the inclusion of disabled students, but this support for the inclusion of disabled students has its limitations because the headteachers merely simplify inclusion, integration and mainstreaming as interchangeable terms. The critical discourse, a discourse articulated by headteachers standing on the principle equality, is the least popular discourse. This chapter also has illustrated the personal and social factors influencing headteachers' views and discourses on inclusion of disabled students. Headteachers' understanding of disabled students is a key factor influencing their views on inclusion. Basically, participants in this research hold two perspectives on disabled students, the functionalist perspective and the critical perspective. The former perspective is commonly articulated by the majority of participants, who tend to think of disabled students in terms of their innate abilities or IQs. This perspective also seems to be commonly held by local and central government educational bureaucrats. The latter, the critical perspective is held only by a few headteachers. Instead of seeing disabled students in terms of their innate abilities, they see students' disabilities from a materialist or stigmatised angle.

Chapter Six, an extended part of Chapter Five, has also shown that there are three major discourses regarding the issue of inclusion of gifted students. They are: the school as a microcosm of society discourse, the privileged class discourse and the dilemmatic discourse. Within the three discourses, the dilemmatic discourse is the most popular discourse articulated by eleven headteachers. Taking students' and their parents' demands for independent gifted education into concern, clearly addressing their preferences for supporting or not supporting inclusion of gifted students seems to be a dilemma for headteachers. The privileged class discourse is the second most popular discourse articulated

by five headteachers. They point out that better teachers, facilities and resources are offered to gifted students and classes and they are regarded as an educational privileged group. Standing on the principle of equality and equity, these headteachers suggest that gifted students should be included in mainstream classes instead of receiving education in independent gifted classes. The school as a microcosm of society discourse is the third popular discourse, articulated by those who suggest that gifted students will enter society eventually so the inclusion of gifted students is necessary. This discourse also has demonstrated that headteachers have recognised the diversity of society and support the inclusion of students with SEN. Again, headteachers' understanding of gifted students is a key factor influencing their views on inclusion. Participants in this research have demonstrated two major perspectives in their understanding of gifted students. The first is the functional perspective. Headteachers holding this perspective tend to argue that students' high IOs, giftedness and high abilities are inherent in their individuals. These are their innate abilities. The majority of participants and central or local government educational bureaucrats are more in favour of this perspective. The second is the critical perspective, another way of understanding gifted students by considering the influence of social and cultural or other elements on them. Headteachers holding this perspective are more likely to support the inclusion of gifted students.

Table 8.1 has summarised these discourses and factors influencing their views on inclusion from Chapter Five and Six. According to this table, 'the school as a microcosm of society' is a common discourse articulated by Taiwanese headteachers on the issue of inclusion of disabled and gifted students. This table also shows that understanding of students with SEN is the common key personal factor influencing their views on the inclusion of disabled and gifted students. Furthermore, competitive credentialism is the common key social factor influencing their views on the inclusion of disabled and gifted students. As far as inclusion is concerned, it can be argued that understanding students with SEN from different perspectives in this credentialistic and capitalist society remains a crucial and key issue for Taiwanese headteachers when linking the two common influential factors.

The promotion and implementation of inclusion of students with SEN influences the continuing role of segregated educational settings. Although no consensual view can be found, it seems that the majority of the twenty five headteachers in this research continue to support segregated special and gifted education settings. Table 8.2 summarises the influential factors on their views on the continuing roles of segregated educational settings. Despite the

fact that there are twelve types of disability and six types of giftedness listed in the Act of Special Education (TMOE, 2004), it seems that headteachers in this research pay more attention to the influence of type and severity of disability. By comparison, the demands of national development are a key factor influencing headteachers' views on segregated gifted education. This may imply that the continuing role and function of segregated special education settings is not seen as important for national development. In other words, this supports the contention made by many researchers that disabled students are often regarded as 'useless' in society, and so they should be separate from the mainstream. Conversely, gifted students are often regarded as national assets and resource and they are so 'useful' that they should be separate from the mainstream as well.

Table 8.1 Headteachers' discourses of inclusion

Inclusion of students with SEN	Inclusion of disabled students	Inclusion of gifted students
Major discourses	<ul style="list-style-type: none"> <li>• The managerialist discourse</li> <li>• The critical discourse</li> <li>• The school as a microcosm of society discourse</li> </ul>	<ul style="list-style-type: none"> <li>• The school as a microcosm of society discourse</li> <li>• The privileged class discourse</li> <li>• The dilemmatic discourse</li> </ul>
Influential factors	<ul style="list-style-type: none"> <li>• Understanding of disabled students</li> <li>• Other personal factors</li> <li>• Social and other factors</li> </ul> <p>(1) Type, level and location of school</p> <p>(2) Voice of parents with non-disabled students</p> <p>(3) Competitive credentialism</p> <p>(4) Powerful people, the government and policies</p>	<ul style="list-style-type: none"> <li>• Understanding of gifted students</li> <li>• Other personal factors</li> <li>• Social and other factors</li> </ul> <p>(1) Type, level and location of school</p> <p>(2) Identification of gifted students and quantity control of gifted classes</p> <p>(3) Competitive credentialism</p>

Table 8.2 Headteachers' views on the continuing roles of segregated educational settings

Educational setting	Special schools	Special classes	Gifted classes
Stance	15 out of 25 headteachers support its continuing role.	19 out of 25 headteachers support its continuing role.	14 out of 25 headteachers support its continuing role
Influential factors	<ul style="list-style-type: none"> <li>• Type and severity of disability</li> <li>• Parental demand, identification ratio of disabled students and free market policy</li> </ul>		<ul style="list-style-type: none"> <li>• Demand of national development and students' and parents' needs</li> <li>• Fairness</li> <li>• Competitive credentialism and conflict between the central and local governments</li> </ul>

## Theoretical and Methodological Limitations

Theoretically, this research has introduced sociological perspectives to the field of special and inclusive education research in Taiwan. The application of a neo-Marxist perspective has offered a new perspective to help understand headteachers' views on inclusion in this research but the contribution of this perspective is still limited. All aspects of Taiwanese society continue to change, and whether the explanatory power of one singular sociological perspective is great enough to explain the Taiwanese special and inclusive education development in the twenty first century is open to question. This research has helped

understand views on inclusion of headteachers with different identities from a variety of schools, but it still has its methodological limitations. Firstly, headteachers' views on inclusion may be understood in depth in this research but generalisation of the research results is not easy due to the small number of participants in this research. This research presents the views on inclusion of a small group of powerful people, who belong to the elite in the Taiwanese educational structure. If headteachers are regarded as ideological and discursive subjects of the government, then their views on inclusion of students with SEN can also reflect the government's views in the meantime. However, applicability of the results is limited. This notion cannot be overstated because their views on inclusion can also be influenced by other social groups, such as parents or other powerful groups. A second limitation arises from the fact that each interview was done once only. The twenty five interviews were finished within two months because of the difficulty of arranging time to interview these headteachers in different locations. It is a fact that I as a researcher had gathered enough data to analyse for this research. However, whether the information collected on only one occasion is valid enough to be used is arguable. Thirdly, in presenting these results, preserving anonymity has always been an issue because some descriptions of the policy and practice regarding the two case studies in Chapter Seven are too detailed. I had intended to avoid identifying the two schools and inclusive models in Chapter Seven. Again, owing to the uniqueness of the two inclusive models, some people may still know the real names of the two schools.

## **IMPLICATIONS FOR POLICY, PRACTICE AND FURTHER RESEARCH**

The notion of inclusion and inclusive education for students with SEN is a global educational agenda developed from the West which has not been influenced by Confucian culture. Taiwan, like some Asian countries, is a country influenced by both Western capitalism and Confucianism. However, its democratic political status is a rare case in Asia. It is this uniqueness that makes it important that understanding and importing the notion of 'inclusion' and 'inclusive education' and putting it into practice should be scrutinised. Although this qualitative research has been undertaken in an Asian country, the findings support several claims and concerns made by both Western and Eastern researchers. Therefore, in the following, I discuss the implications of this research for three groups: the policymakers, the educational practitioners and researchers.



## **Implications for National Policymakers**

This research has identified three key problems in promoting and implementing inclusion. The first problem is that educational bureaucrats' and policymakers' understanding of the notion of inclusion seem to be unclear. This problem leads to the unclear definition of inclusion in legislative and policy documents. The first implication of this research is therefore that the Taiwanese government should offer a more workable and comprehensive and clear operational definition of inclusion. Owing to the government's unclear definition on inclusion, school leaders or bureaucrats in LEAs may not have clear guidelines to follow. For this issue, more pre- and in-service training courses on inclusion for these headteachers are necessary. As Chapter Two has argued, the educational reform movement in the 1990s intended to separate special and gifted educational issues from the mainstream educational agendas. This act may increase the segregation between educational systems and fail to see special and gifted educational issues from a broader perspective. It is this problem that always taking special, gifted and inclusive educational issues into consideration in national educational reforms becomes necessary. The second problem is educational bureaucrats' and policymakers' unwillingness to implement inclusive education more comprehensively. Influenced by considerations of competitive credentialism and the local, national or international competitive climate, the government may face a dilemma about whether to reduce or increase competitive abilities in the field of education. This dilemma affects the willingness of headteachers to undertake comprehensive implementation of inclusion in educational settings. Another reason for reluctance of comprehensive implementation of inclusion may arise from the government's doubt or concern about the influence of inclusion on the quality, effectiveness and efficacy of education. In order to promote inclusion, paying less attention to credentialism and academic competition within the education system and offering more equal and quality educational services for every student is necessary. Thirdly, according to this research, it is also found that the government seems to have different standards for identifying and assessing disabled and gifted students, although they are all regarded as students with SEN. The ways of understanding disability and giftedness have had profound influence on the implementation of inclusive education. Adopting the functional perspective has always been a key stance of the Taiwanese local and central educational bureaucrats and policymakers in their understanding of students with SEN. This way may narrow and limit other possibilities for promoting and offering more flexible and inclusive educational services for students with SEN. Therefore, adopting a broader range of perspectives to help understand students' disability and giftedness is another urgent and

crucial task for the national policymakers as well. As far as the current inclusive practices are concerned, the government also should constantly and rigorously scrutinise the two luxurious inclusive models discussed in Chapter Seven. Whether investing the governmental educational expenditure in the two so-called inclusive programmes with competitive and selective admission is effective and promoting equality is highly questionable.

### **Implications for School Headteachers**

Turning now to implications for headteachers as school leaders, headteachers may need to rethink the meaning and definition of inclusion within the Taiwanese educational context before implementing inclusion in real school settings. Understanding and distinguishing the difference between the notions of mainstreaming, integration, normalisation and inclusion is necessary. Again, rethinking and understanding definitions of students with SEN, including disabled and gifted students, is crucial as well because these definitions often influence their understanding and practice of inclusion in real educational arenas. Although the headteachers in this research have said that they receive little information or policy regarding inclusion from local or central governments, this is not to claim that they should stop actively looking for relevant resources and information about promoting and implementing inclusion at schools. A headteacher as the school leader and manager is always the key figure to influence the entire school policy and staff. As such, more support for staff is important for promoting and implementing inclusion school wide. For those schools with segregated and independent special and gifted education settings, headteachers should also think about offering more flexible and diverse services for those students with SEN. According to this research, however, it has been found that voices of parents as educational customers have a strong influence on headteachers' views on the promotion and implementation of inclusion. It is in the light of this influence that communication between the headteacher and parents with particular reference to the issue of inclusion of students with SEN becomes more important. A visionary headteacher should take the responsibility to understand the notion of inclusion more and communicate with parents more often.

### **Implications for Further Research**

It has been the contention of this research that sociological research on special and inclusive education research is scarce in Taiwan. This research therefore has attempted to adopt a neo-Marxist perspective to analyse school leaders' views on inclusion and criticise the current

inclusive education practice in Taiwan. The first implication of this application is that it is necessary to call for the application of more diverse sociological perspectives in special and inclusive education research in Taiwan. In the West, the UK in particular, researchers have tried to apply various sociological perspectives to investigate inclusive education and inclusion for more than at least two decades. Comparatively, the number of sociological research projects on special and inclusive education and inclusion is surprisingly few. This is understandable. Taiwan is still a Confucian society respecting authority and reluctant to be critical or to challenge authorities. Since sociological perspectives often take a critical and challenging stance, applying these perspectives to undertake research may not be as popular as conducting a positivist quantitative survey. However, Taiwanese society has been changed rapidly and more advanced and critical perspectives to examine special and inclusive education are crucial and necessary. Secondly, how the concept of disability is defined and understood influences the way we understand and seek to address the question of inclusion (Barton, 1998). This argument can also be applied to the concept of giftedness and talents. The preceding analysis regarding the linkage between headteachers' understanding about disability and giftedness and inclusion has supported this argument. This implies that the necessity of undertaking more disability and giftedness research is urgent. In particular, research on understanding of the notions of disability and giftedness from perspectives of educational elites, such as educational bureaucrats, policymakers or headteachers, is needed. Gifted education practice has been implemented in Taiwan for more than two to three decades at least. Sociological research on giftedness and gifted education is scarce as well. For example, as the research has argued in Chapter Three, Chiang & Liao's (2004) research is the only research adopting the neo-Marxist perspective to investigate gifted education development in Taiwan. Although this thesis has tried to incorporate the element of gifted education, undertaking more sociological research on giftedness and gifted education is still very urgent and crucial in Taiwan.

Thirdly and the most importantly, more 'researching-up' studies on views of educational bureaucrats, elites and policymakers on the inclusion of students with SEN is undoubtedly urgent and necessary. To date, this research can be claimed as the first sociological research using a qualitative approach to investigate headteachers' views on inclusion. No research has been undertaken to explore views of Taiwanese educational policymakers and bureaucrats of central and local governments on inclusion. Again, this may be attributed to the influence of features of Confucianism such as revering authorities and unwillingness of researchers in Taiwan to challenge authorities. It is this fact that the cooperation between national

policymakers, educational practitioners such as headteachers and researchers is significant. Based on this research, it is recommended that time arrangement and management should be viewed as a top priority when doing research-up studies. This is particularly important if researchers attempt to use elite interviewing as a method to research up policymakers or other powerful groups. In the very beginning, this research attempts to interview thirty headteachers. However, five of them cannot participate in this research owing to their busy school work. The twenty-five interviews take place from November to January. This period is approaching to the end of semester which is a busy time for school staff. This experience implies that time arrangement is even more important if researchers attempt to research policymakers because they can be busier than these headteachers. The fewer time to interview these elites, the less reliable and valid quality of the interview contents will be. Owing to limitation of time and budget of this research, every interviewee is being interviewed once only. Although I as a researcher have paid much attention to focus on interviewing and retrieving information which I need, how to maintain the consistency, reliability and validity of the once-and-only elite interviewing content is a serious concern. In order to overcome this drawback of this research, strategies such as increasing the length and frequency of interviewing and combining quantitative method in further research are recommended.

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